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ABSTRACT

The document is a revision of earlier units, updated to include behavioral or performance objectives. Divided into 22 units of instruction, the course outline for distributive education presents suggested length of time for each part of a unit, prerequisites, a description of the part, objectives, sources, outline for the section, activities, handouts, case studies, and forms to be used where applicable. The unit topics are: orientation to distributive education, job placement, personality improvement, human relations, salesmanship, product knowledge, communications, mathematics of distribution, store policy, store security, cash register, sales promotion, careers in marketing, business operations, types of distributive enterprises, American economic systems, business law, business ethics, personal finance, transportation and warehousing, marketing research, and student store. (AG)

ED 089025

DISTRIBUTIVE EDUCATION

UNITS OF
INSTRUCTION

U.S. DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION
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Revised 1972

CE 001 069

P R E F A C E

This course of study was developed at the grass roots by ten DE Coordinators whose names are listed in the appendix.

Starting with the old units, dated 1964, the first step was to rewrite and update the units in terms of behavioral or performance objectives. This was accomplished at Central Washington State College in Ellensburg, in concert with the Coordinating Council for Occupational Education, under the direction of Dr. John M. Chrismer, during a two-week session.

During the 1971-72 school year, each unit was tested locally by ten additional coordinators, whose names also appear in the appendix. A one-week workshop in June, 1972, was held, under the direction of K. Otto Logan, Program Director, Distributive Education, and his staff together with the contracted services of Tom Stiger, Local Vocational Program Director at Everett. The writers and testers compared notes and completed the project.

It was highly recommended by this group that the course of study not be released to a coordinator without his opportunity to have a two-hour, oral explanation of how it could best be used.

The course has in it a convenient, built-in evaluation form so each coordinator may easily check on its value to him in terms of student performance and in terms of accountability to the public. The course is realistic, practical, and most exciting with a potential for continued program and curriculum development.

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AAB:bal

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UNIT I

ORIENTATION TO DISTRIBUTIVE EDUCATION

PART 1 Distributive Education Defined
2 Objectives of D.E.
3 Basic Understandings
4 Autobiography
5 Scope of the Program
6 Elements of the Program
    Classroom
    Training Station
    DECA
7 Advantages of the Program
8 Responsibilities of the Participants
9 Types of Acceptable Jobs

UNIT I - ORIENTATION
Part 1 - Distributive Education Defined

Length: Open

Prerequisite: Have an interest in business.

Description: This part will define the Distributive Education Program and Philosophies.

Objective: At the completion of this unit the student will describe orally or in writing to the instructor a definition of the Distributive Education Program including all the elements as detailed on the handout provided by the instructor.

Sources:
Washington State Distributive Education Coordinator's Guide, page 3
Retailing, Principles and Practices, 5th Ed., Richert et al, page 556
Distributive Education, Training for Business the Practical Way: Washington State Distributive Education Office, Olympia, Washington
Distributive Education, What It Will Do For You same source as above
Personal Interviews
Handouts included

OUTLINE

I. Distributive Education
   A. Relationship to Vocational Education
   B. Education for Distributive Occupations
   C. Cooperative Class
   D. Offered for:
      1. High School Students
      2. Community College Students
      3. Vocational Technical School Students
      4. Adults

ACTIVITIES

1. Read over the outlines.
2. Have former Distributive Education students conduct discussion in class about the elements of the Distributive Education Program.
3. Watch the movie, "Tell it Like it is," Sears Roebuck Film

Distributive Education Defined

Distributive Education is a program of study at the high school, technical and adult level which has as its primary objective the preparation of people for gainful employment in distribution. It is people centered and has marketing as its core discipline. Distributive Education also utilizes other disciplines such as the social sciences, accounting, etc., and may rely on the development of a technology. The technology is the special skill or knowledge needed to perform in an occupational area in addition to knowledge of distribution, ie., auto mechanics for garage owner or barbering skill for a barbershop owner.

Distributive Education is not terminal education. It is forward looking and prepares people for entry into a distributive occupation or further education in the distributive area.

Distributive occupations are found in all functions of marketing - buying, selling, standardizing, and grading, storing, transporting, financing and risk-bearing --- as performed by manufacturers, wholesalers, retailers, and service businesses.

Suggested Program of Study for the Two Year
(Plan "C") High School DE Program,
State Department of Education,
Division of Vocational Education,
Distributive Education Service,
34 N. High Street
Columbus, Ohio 43215

SECTION 1: INTRODUCTION TO COOPERATIVE DISTRIBUTIVE EDUCATION

I. Distributive Education Defined

A. What?

Distributive Education is a vocational program of instruction for students interested in careers in marketing--including retail, wholesale, and service occupations.

Distributive occupations are those followed by proprietors, managers or employees engaged primarily in marketing and merchandising goods or services. Such occupations may be found in various business establishments including, without being limited to, retailing, risk-bearing, wholesaling, manufacturing, storing, transporting, and financing. Distributive occupations do not include trade, industrial, or office occupations.

The secondary program is designed to prepare students for gainful employment in entry level positions in marketing. Upon graduation from high school, the student may continue his education in the junior college Distributive Education program which will prepare him for supervisory positions in the field of marketing. Should the student then decide to transfer to a senior college or university, he may pursue a four-year degree in business administration or marketing through which he will qualify for executive positions, or a degree in Distributive Education which will qualify the student for a position of Distributive Education teacher-coordinator. At any point along this continuum, the student may elect to enroll in adult Distributive Education courses to upgrade and/or to refresh his competencies in his distributive occupation.

B. Who?

A student may enroll in the Cooperative Distributive Education program if he is a junior or senior sixteen years of age or older. He should have a career objective in the field of marketing; he should be able to profit from the instruction; and he should meet the local admission requirements.

The student is screened by the guidance counselor and the program coordinator, and approved by the principal. Past records, test results, faculty rating reports, and character references are used to determine whether or not the student can profit from the program. Personal counseling with the parents and the student is done to enable the student to select a career objective in marketing which is in keeping with his abilities and interests.

C. Why?

1. To prepare the student for future advancement in the field of marketing.
2. To develop an awareness of the varied career opportunities in marketing.
3. To enhance the employability and educational background of the college-bound student who plans to major in business administration and/or marketing.

4. To develop an understanding of the responsibilities which the person engaged in distribution must shoulder to help maintain a prosperous, free-enterprise economy.

D. How?

The objectives of the Cooperative Distributive Education program are achieved through:

1. Classroom instruction

   The major objective of classroom instruction is to provide educational experiences in prescribed areas of learning through which the student can develop the competencies demanded in the pursuit of his career objective. The curriculum includes such areas of study as merchandising, organization, location, finance, economics, store layout, and marketing management.

2. Occupational Experience

   The major objective of this phase is to provide direct business experience whereby the student may personally observe and participate in the application of classroom studies in the business world. This occupational experience is provided in an approved training agency for a period of not less than fifteen hours per week and is correlated with the classroom instruction.

3. Co-curricular activities

   The Distributive Education Clubs of America, known as DECA, is a national youth organization whose program of leadership development is designed specifically for students enrolled in Distributive Education programs. The student is eligible to participate in his local DECA Chapter, his state DECA organization, and National DECA. Each Chapter elects its own student officers and the teacher-coordinator serves as the chapter advisor.

   The DECA program is designed to complement, supplement, and strengthen the instructional program. When combined with classroom instruction and occupational experience, it gives greater scope and depth to the total program as it provides for student-centered participation in activities which are of particular interest to the members.

UNIT I - ORIENTATION

Part 2 - Objectives of Distributive Education

Length: Open	
Prerequisite:	Know the definition of Distributive Education
Description:	A presentation of the objectives of the Distributive Education Program.
Objectives:	The student will be able to describe four objectives for the students enrolled, two for the school, and two for the businessman involved of the Distributive Education Program from the materials provided by the instructor.
Sources:	1. Handout provided in Part 1 2. Coordinators Guide, Page 15 3. Training for Business, the Practical Way. Washington State D.E. Office

OUTLINE

I. Objectives of the Distributive Education Program
   A. For the students enrolled
   B. For the Businessman involved
   C. For the School concerned

ACTIVITIES

1. Invite a guest speaker from the State Staff, a former student, or a coordinator from another school.
2. Show the film, "Tell it Like it is," from the Sears Foundation.
3. Show the older film, "The D.E. Story," from the Sears Foundation.

UNIT I - ORIENTATION

Part 3 - Basic Understandings of the D.E. program

Length: Open

Prerequisite: Know what Distributive Education is.

Objectives: The student will know

1. When his local program was founded.
2. When the State and National Organization was instituted.
3. A general background of D.E.
4. The difference between the D.E. classes and the other classes offered by the schools.

Sources:

1. Handouts provided in part 1
2. Class discussion
3. Coordinators Guide, page 7-14. General info and basic knowledge.

OUTLINE

I. Basic Understandings
  A. Backgrounding Distributive Education
    1. Distributive Education is one of four services of Vocational Education.
    2. It is Federally reimbursed under the George-Barden Act.
    3. Students must be vocationally adaptable--able to advance in position.
    4. Students must be 16 years of age or older.
    5. It is a course in "how to do," rather than "about" salesmanship and merchandising.
    6. D.E. laboratory not provided by the school as in other "lab" courses, but by local merchants. As in other "lab" courses, the D.E. training station may require a certain amount of homework from time to time.
    7. One out of every 4 persons gainfully employed is in a distributive occupation. It is estimated that about half the price of merchandise sold at retail is tied up in distribution. D.E. gives students a head start in this rapidly expanding field.
    8. The first major assignment that each student will have is to sell himself to an employer--get a job.
    9. Set a tentative deadline for employment.
    10. Explain attendance requirements and penalties (school and work)
    11. Assignment requirements, and
    12. Historical background, Local, State, National.
    13. Conduct requirements--school, job and free time.
  B. The Place of Distribution in Our Economy
    1. What is included in the distributive process (functions of marketing)?
    2. The Growing Importance of Distribution
      a. Increase in population
      b. Growth of national income--the "affluent consumer"

    c. Geographical shifts in population with resultant shifts in consumption patterns
    d. Expanding wants and needs
    e. Growth in national production
    f. Increased need for efficient distribution of products: Mass production requires mass distribution
3. Importance of the salesman in distribution
    a. Salesmanship is biggest force in sustaining high standard of living.
    b. Salesmen create demand, then help buyers find the means to satisfy that demand.
    c. It is the salesman that informs the consumer about new products.
    d. Salesmanship lends incentive to the concept of free enterprise, the basis of our whole economic system.
    e. Any breakdown in the selling chain most often occurs at the point of sale
    f. Consider the chaotic impact of a nation-wide salesmen's strike.

ACTIVITIES

1. Class discussion
2. Have students compile a 3 ring notebook covering everything that happens during the year. It should contain classnotes, handouts, summaries of films, speakers, field trips, and any other significant things that may take place such as DECA activities they have been involved in. This will be helpful when you fill out their D.E. Diploma. Work record and hours summary should also be included.

UNIT I - ORIENTATION
Part 4 - Autobiography

Length: Open
Prerequisite: None
Description: An exercise in writing an autobiography so that the instructor can better counsel the students in his class.
Objectives: The student will write a confidential paper in paragraph form in which he discusses himself in regard to all the questions asked in the outline provided. THIS INFORMATION WILL REMAIN STRICTLY CONFIDENTIAL BETWEEN THE STUDENT AND THE INSTRUCTOR.
Sources: 1. Students reactions based on personal experiences.

OUTLINE

Autobiography

I. Personal information
    A. name, age
    B. where you are now employed
    C. where you have previously been employed
    D. where you parents are employed
II. Your special interests both in and out of school
III. Why you feel D.E. will help you personnally
IV. What personal benefits you hope to realize from the program.
V. Your occupational goal after High School
VI. What qualifications you have now that fit you for your occupational goal.
VII. What you beleive this class should cover this year and in what order.
VIII. Any problems you may have on the job you are currently holding. (if any)
IX. Problems (personal or otherwise) that may influence how you perform on the job.
X. What schools you have attended and what subjects you like in school.

ACTIVITIES

1. Discuss in class the importance of having a person to talk confidentially with about personal problems.

UNIT I - ORIENTATION

Part 5 - Scope of the D.E. Program

Length: Open

Prerequisite: Know what D.E. is.

Description: Studying the various levels at which the D.E. program is offered.

Objectives: The student will know that the one class he is associated with is only part of the total offerings of D.E.
The student will be able to explain to the instructors satisfaction the total scope of the D.E. program.

Sources:
1. Handouts provided in Part 1
2. Coordinator's Guide, page 19

OUTLINE

Scope of the D.E. Program

- I. High School level
    - A. Junior preparatory level
    - B. Senior Cooperative level
- II. Post High School
    - A. Mid-management Courses
        - 1. general
        - 2. specific
    - B. Four year college programs
    - C. Continuing Education or Adult Education
- III. DECA--Juniors, Seniors, Community College, Collegiate, Alumni

ACTIVITIES

1. Class discussion
2. Handouts
3. Coordinator's Guide, page 19

UNIT I - ORIENTATION

Part 6 - Elements of the D.E. Program

Length: Open

Prerequisite: Know the definition of Distributive Education

Objectives: Student will be able to differentiate to the satisfaction of the instructor either orally or in writing, what activities of the D.E. Program belongs under each of the three major elements from the list provided.

Sources:
1. Coordinator's Guide
2. Interviews with former students, coordinator, or employers
3. Handouts provided in Part 2
4. DECA Handbook

OUTLINE

The Total D.E. Program

I. Classroom training
   A. Course Content
      1. Salesmanship
      2. Advertising
      3. Human Relations
      4. etc.
   B. Activities
      1. Discussions
      2. Role playing
      3. Speeches
      4. Field trips
      5. Group Instruction
      6. Individual instruction
      7. Other
   C. Measurement
      1. Tests
      2. Projects
      3. Demonstrations
      4. Other

II. On the Training Station
   A. Practical Experience
      1. 15 hours per week
      2. approved training station by the coordinator
      3. supervised by the coordinator (experiences)
      4. training sponsor--downtown faculty
   B. Working part-time
      1. demonstration of skills learned in school
      2. take on new responsibilities
      3. performance at an acceptable level to the employer and coordinator
      4. above and beyond the call of duty

C. Measurement
    1. Employer rating sheets
    2. Instructor's coordinative activities
    3. pay raises

III. DECA (see the attached outline)

DISTRIBUTIVE EDUCATION CLUB PROGRAM

A. The High School D.E. Club Program
   1. What is the Club Program?
   2. Specific Purposes of the Club Program
B. Local D.E. Clubs
   1. Background of the local Club Program
   2. Responsibilities of the local Advisor
   3. Steps in organizing a local Club
   4. Developing a Program of work
   5. The High School "Governor" in the local Chapter
   6. Local Chapter meetings
   7. Local Chapter activities
   8. Special projects or local Clubs
C. The State Club Program
   1. History and organizational structure of the State Club Program
   2. The W-DECA Governors' Conference
   3. The Officer training and Conference planning meeting
   4. The State Regional Career Development Conference
   5. The W-DECA Career Development Conference
D. The National Club--DECA
   1. History and organizational Structure of the National Club Program
   2. The National DECA Handbook
   3. Annual Western Regional Career Development Conference.
   4. Annual DECA National Leadership Conference

UNIT I - ORIENTATION

Part 7 - Advantages of the D.E. Program

Length: Open

Prerequisite: Know the definition of the D.E. Program

Objectives: The student will be able to list 10 advantages of D.E. for himself, 5 for the employer, 4 for the school and 3 for the community from the sources provided.

Sources:
1. Coordinator's Guide
2. Handouts (attached)

OUTLINES

Advantages of the D.E. Program
- I. To the student
  - A. Four freedoms of a good salesperson
  - B. Others
- II. To the employer
- III. To the School
- IV. To the Community
- V. To the nation
  - a. income tax

ACTIVITIES:

1. Class discussion during which the students suggest advantages to the various participants and the instructor lists them on the board, even before they have had a chance to study this area.

UNIT I - ORIENTATION
Part 7 - Advantages of the Program
Handout 1

Advantages of Distributive Education

I. For the student:
  A. Gains actual business experience
  B. Acquires knowledge and attitudes necessary for top job performance
  C. Learns to assume responsibilities
  D. Learns to work for and with people
  E. Develops personality and poise
  F. Learns to handle personal income
  G. Learns to be a better consumer
  H. Develops qualities of good citizenship
  I. Makes an easy and satisfactory transition from school to full-time work
  J. Opens the door to any of the excellent positions open to the successful businessman by giving him the tools to become one.
  K. Ultimately enjoys the four freedoms of a good salesperson:
    1. Freedom from fear of getting fired--as long as he is producing, because no company will fire a man who is a source of its business.
    2. Freedom from being underpaid for good work--because he gets paid in direct proportion to how much he sells at a set commission rate.
    3. Freedom from office politics -because no company can afford to judge him by any standards other than how much he sells, and his sales are a matter of indisputable company record.
    4. Freedom from getting stranded in a low-wage bracket--because he can increase his earnings in accordance with his increasing sales ability and his desire to work.
  L. Coordinator should supply others.

II. For the employer:
  A. Obtains pre-selected part-time help
  B. Gets the opportunity to help train future full-time employees in his own system.
  C. Aids the employer in public relations
  D. Provides a more direct return for his taxes
  E. Provides him with a call list reserve for part-time help
  F. Helps him keep his turnover rates lower on his personnel
  G. Gives him the opportunity to express ideas regarding school programming and planning
  H. Others may be solicited from the students

III. The School
  A. Can project itself into the community and encourage better school-community relations
  B. Can enrich the curriculum by providing a work-experience laboratory necessary in preparation for specific occupational goals
  C. Can provide inexpensive education in as much as there is no cost for laboratories

   - D. Can keep abreast of current business trends
   - E. Others may be solicited from the students

IV. The community
   - A. Can retain better young people, after graduation, in the community
   - B. Is provided with a constant source of labor
   - C. Builds a greater awareness of how businesses operate and why they have to do certain things.

UNIT I - ORIENTATION

Part 8 - Responsibilities of the Participants

Length: Open

Prerequisite: Know what D.E. is and what the objectives of the Program are.

Description: A study of the responsibilities of the participants of the D.E. Program

Objectives: The student will know the responsibilities of the school, the employer, the training sponsor, the Coordinator, his parents, and himself in relation to the D.E. Program from the materials provided.

Sources:
1. Coordinator's Guide
2. Handouts

OUTLINE

Participants Responsibilities

A. The School to the
  1. Student
  2. Coordinator
  3. Employer (sponsor)
  4. Parents of student

B. The Employer to the
  1. Student
  2. Coordinator
  3. School
  4. Parent

C. The Coordinator to the
  1. Student
  2. Employer
  3. School
  4. Parent

D. The Student to the
  1. Employer
  2. School
  3. Parent
  4. Coordinator
  5. Classmates and other D.E. students

Responsibilities of Participants in the Distributive Education Program

I. The School
   A. Assists the student in the development of vocational interests and in acquiring needed competencies for employment.
   B. Assists distributive employers in locating, instructing, and supervising students who are interested in careers in their type of business.

II. The Employer
   A. Assists the school in the education of students seeking careers in marketing.
   B. Assists the student in obtaining meaningful occupational experience for becoming a valuable employee capable of advancement.

III. The Coordinator
   A. Assists the student in defining his career objective.
   B. Provides meaningful educational experiences in the classroom which will develop those competencies required for distributive employment.
   C. Serves as the student's advisor in assisting the student to obtain job training and in supervising the student on the job.
   D. Provides encouragement and guidance to the student as he seeks to develop the highest standard possible.
   E. Serves as the faculty sponsor for the local DECA chapter activities.

IV. The Student
   A. To the School
      1. Complies with all school regulations and requirements.
      2. Maintains regular attendance.
      3. Cooperates with faculty members and with other student organizations
   B. To his Employer
      1. Complies with all rules and regulations of his training agency.
      2. Is punctual and maintains regular attendance at work.
      3. Cooperates with other employees.
      4. Observes safety practices.
      5. Exemplifies honesty, loyalty, dependability, and a sense of responsibility.
      6. Makes every effort to profit from the experiences offered by the employer, making his employment profitable to the place of business.
   C. To the Coordinator
      1. Maintains high standards of conduct in all classes, school activities, and job performance.
      2. Keeps coordinator informed of personal problems and on-the-job problems which may effect his work.
      3. Maintains up-to-date records required by the coordinator. These records may include:
         a. daily-weekly-hourly wage records

   b. individual assignments in individually related instruction
   c. personal improvement projects
   d. personal budgets (including money earned, spent, and saved)
   e. personal data records

4. The student must conduct himself at all times in a manner which will reflect credit on the school, the student body, the Distributive Education Program, and himself.

UNIT I - ORIENTATION

Part 9 - Types of Acceptable Jobs

Length: Open

Prerequisite: A General knowledge of the D.E. Program

Description: Identifying the various jobs available that fit the criteria for a Distributive Occupation training station

Objectives: The student will be able to identify those jobs available to him in his community that are considered acceptable.

Sources:
1. Handouts
2. Discussion in Class

OUTLINE

Acceptable types of jobs for D.E. Training

I. Vertical Classification
    A. Retail
    B. Wholesale
    C. Service
    D. Miscellaneous

II. By the USOE Code

ACTIVITIES

1. Have students survey their town with each student assigned a street or section of town and have that student classify the businesses according to the outline and United States Office Of Education Code(attached).

UNIT I - ORIENTATION
Part 9 - Types of Acceptable Jobs
Activity 1

Distributive Occupations According to Frequency of Occurrence

- I. Retail Trade
  - A. Lumber, Building Materials, Hardware, Farm Equipment
  - B. General Merchandise
  - C. Food
  - D. Automotive
  - E. Apparel and Accessories
  - F. Furniture, Home Furnishings, and Equipment
  - G. Eating and Drinking Places
  - H. Other Retail Stores
  - I. Non-store Retailers
- II. Wholesale Trade
  - A. Motor Vehicles, Automotive Equipment
  - B. Drugs, Chemicals, Allied Products
  - C. Dry Goods, Apparel
  - D. Groceries and Related Products
  - E. Farm Products--Raw Materials
  - F. Electrical Goods
  - G. Hardware; Plumbing and Heating Equipment and Supplies
  - H. Machinery, Equipment, Supplies
  - I. Miscellaneous Wholesale
- III. Services
  - A. Hotels, Camps, and Other Lodging Places
  - B. Personal Services
  - C. Business Services
  - D. Automobile Repair, Automobile Services, Garage
  - E. Miscellaneous Repair Services
  - F. Motion Pictures
  - G. Amusement and Recreation Services
- IV. Transportation
  - A. Railroad Transportation
  - B. Local and Suburban Transit and Interurban Passenger Transportation, including Taxi Cabs
  - C. Motor Freight Transportation and Warehousing
  - D. Water Transportation
  - E. Transportation by Air
  - F. Pipe Line Transportation
  - G. Transportation Services
  - H. Communication
  - I. Electric, Gas and Sanitary Services
- V. Financing
  - A. Banking
  - B. Credit Agencies Other than Banks

C. Security and Commodity Brokers, Dealers, Exchanges and Services

VI. Insurance
  A. Insurance Carriers
  B. Insurance Agency, Brokers, and Service

VII. Real Estate

UNIT I - ORIENTATION
Part 9 - Types of Acceptable Jobs
Activity 1

UNITED STATES OFFICE OF EDUCATION CODE OF CLASSIFICATION FOR DISTRIBUTIVE EDUCATION JOB ACCEPTABILITY

01 Advertising Services
02 Apparel and Accessories
03 Automotive
04 Finance and Credit
05 Floristry
06 Food Distribution
07 Food Services
08 General Merchandise
09 Hardware, Building Materials, Farm and Garden Supplies and Equipment
10 Home Furnishings
11 Hotel and Lodging
12 Industrial Marketing
13 Insurance
14 International Trade
15 Personal Services
16 Petroleum
17 Real Estate
18 Recreation and Tourism
19 Transportation
20 Retail Trade, other
21 Wholesale Trade, other
99 Distributive Education, other

UNIT II

JOB PLACEMENT

Part 1 What a Job Means
2 Considerations in Choosing a Job
3 Social Security and Withholding Information
4 Work Permits
5 The Personal Data Sheet (Resume)
6 Filling Out the Application Form
7 The Letter of Application
8 Prospecting For a Job
9 Preparing For the Interview
10 During and After the Interview
11 Tips For Keeping Jobs

UNIT II - JOB PLACEMENT
Part 1 - What a Job Means

Length: Open
Prerequisite: An interest in acquiring a job.
Description: A study of what a job means to an individual.
Objectives: The student will be able to decide which of the ideas discussed in this part are the most important to him/her and arrange them in the order of importance to him/her, most important first.
The student will be able to explain to the satisfaction of the instructor what constitutes a "Standard of Living".
Sources: Marketing and Distribution Program, Washington State Distributive Education Curriculum Guide, 1970, page 20
The Job You Want, Andrews, 1968, page 1 and page 39
Handouts

OUTLINE

What a Job Means
I. Means of making a living
  A. Pay vs. experience or education
  B. Standard of living
  C. Changing needs
  D. Leisure time
  E. Variety of employers
II. Means of self-expression
III. Way to build an estate
IV. Should be something you like

ACTIVITIES

1. Survey the students in your class to have them tell you why their father or mother is working on the job they are. Then have them ask their parents that night why they actually are on the job they are on and discuss the answers in class.
2. Survey the business people in the shopping area and ask them why they are working on the jobs they are and discuss the results of the survey in class.

UNIT II - JOB PLACEMENT
Part 1 - What A Job Means
Handout 1

What A Job Means

I. A Job is a means of making a living
  A. Pay varies greatly and is usually based on experience and/or education.
  B. Your standard of living, now and later, depends on your earning power.
  C. Your needs change as you grow older, hence your earning power ought to grow with them.
  D. Increasingly, leisure time will be a part of your life. Will your income support the leisure time activities you desire.
  E. Employers are fussy. You must prepare yourself for landing and holding the right job--the job which will grow as your needs grow:
    1. You must prepare yourself with appropriate education and training.
    2. You must accept the need for work, the need to give a dollar of effort for a dollar earned.
    3. You must accept the need to continually upgrade yourself throughout your career.
    4. You must understand that work and leisure ought to combine to make a balanced, satisfying life.
    5. Girls should recognize that, statistically, marriage will probably not be your only career. Women are increasingly going to work because:
      a. The family needs more money than the husband can make.
      b. The male wage earner is lost through divorce, death, the draft, or disability.
      c. A mother simply gets bored after her kids are grown.
      d. You recognize that you and your husband can retire earlier if you go to work.

II. A job is a means of self-expression and achievement.
III. A job is a way to build an estate for retirement.
IV. Since you will spend about half your life on the job, it ought to be something you like.

UNIT II - JOB PLACEMENT

Part 2 - Considerations in Choosing a Job

Length: Open

Prerequisite: A desire to acquire a job.

Description: A study of what one should consider before choosing a job.

Objectives: At the completion of this part the student will be able to:

1. Demonstrate his knowledge of the requirements of acceptability for a D.E. job by acquiring an acceptable job.
2. Analyze his interests, possible experience to be gained, pay, possible future opportunities, and his self-image in relation to a job he thinks he would like to work in.
3. Complete a personal inventory of his skills and abilities he has to sell to a prospective employer.

Sources:
The Job You Want, Andrews, Gregg, 1968, page 20
Business Behavior, Russon, 3rd Ed., page 209
Salesmanship Fundamentals, 3rd Ed., page 439
Marketing and Distribution, Mason and Rath, 1968 page 534

OUTLINE

Considerations In Choosing A Job

I. Criteria for acceptability
   A. Must be a Distributive Job
   B. Must provide career opportunities
   C. Environment and duties must contribute to career preparation
   D. Employer must understand D.E. training concept
   E. Hours of employment must coincide with the requirement
   F. Wage must be acceptable
   G. Must be a progressive business establishment
   H. There must be a provision for effective on-the-job training
   I. The job and place of employment must be approved by the Coordinator.

II. Four serious considerations
   A. What interests you?
   B. What will give you valuable experience?
   C. What pays well and has a future?
   D. What fulfills your self-image?

III. Determine what you have to sell by introspection.
   A. Interests
   B. Aptitudes
   C. Experiences
   D. Previous employment
   E. Organizations you have belonged to and in what capacity.
   F. Personality traits

Note: Refer to the personality unit for items with which to evaluate your personality.

ACTIVITIES

1. Have each student take the GATB (General Aptitude Test Battery) administered by the Washington State Employment Security Department.
2. Check each student's file for aptitude and interests tests as well as for experiences that may be used in conjunction with counseling for jobs.
3. What Motivates Me (attached)

UNIT II - JOB PLACEMENT
Part 2 - Considerations in Choosing a Job
Handout 1

What Motivates Me?

Please mark the five items from the list below that you believe are most important motivating you to do your best work, and the five which are the least important.

1. Steady employment
2. Having an efficient supervisor
3. Feeling my job is important
4. Having a newsletter
5. Not having to work too hard
6. Fair vacation arrangements
7. Getting a good performance rating so I know where I stand
8. Respect for me as a person
9. Getting along well with others on the job
10. Chance to do work while not under direct or close supervision
11. Opportunity for self development and improvement
12. Large amount of freedom on the job
13. Attending faculty meetings
14. Having a written description of my job
15. Good pay
16. Knowing I will be disciplined if I do a poor job
17. Knowing what is going on in the rest of the organization
18. Adequate rest periods and coffee breaks
19. Having an employee council
20. Pensions and other security benefits
21. Good physical working conditions
22. Opportunity to do interesting work
23. Chance to do quality work
24. Being told when I do a good job
25. Agreement with goals and objectives
26. Chance for promotion
27. Others

UNIT II - JOB PLACEMENT

Part 3 - Social Security and Withholding Information

Length: Open
Prerequisite: A desire to secure a job.
Description: How to apply for a Social Security Card and fill out the exemption certificate.
Objectives: The student will be able to:

1. Apply for and actually get a social security card if he does not have one.
2. Apply for and receive a summary of their earnings to date from the Social Security Department if he already has his Social Security Card.
3. Fill out an employees withholding exemption certificate as it applies to their specific personal situation.

Sources:

1. Materials acquired from the Social Security Department and the Women's and Minor's Division of the Department of Labor and Industries.
2. Handouts
3. Refer to the Unit on Business Law for more information on Social Security.

OUTLINE

I. Social Security
  A. What it is
  B. How it works
  C. Who benefits
  D. Why get a card
  E. How do you get a card
II. Employees Withholding Exemption Certificate
  A. What it is
  B. Why fill it out
  C. Who gets it

ACTIVITIES

1. Clip newspaper articles out of the newspapers and discuss those that pertain to Social Security.
2. Have a small group of students (5) investigate Social Security and report their findings in a panel discussion.
3. Invite a speaker from either the Social Security Office or the Women's and Minor's Division to discuss the issues.
4. Have each student send for "Request for Statement of Earnings".

UNIT II - JOB PLACEMENT
Part 4 - Work Permit

Length: Open
Prerequisite: A need for the work permit because of the age requirement.
Description: How to fill out a work permit.
Objective: Each student will be able to correctly complete an application for a work permit as it pertains to his individual training station to the satisfaction of the coordinator.
Sources:
1. Women's and Minor's Division of the Department of Labor and Industries.
2. School Library
3. Handouts

OUTLINE

I. Filling out the Work Permit
   A. Who needs one
   B. What signatures are required
   C. When is school approval necessary
      1. Who needs to sign
   D. Proof of age required
   E. Where does the form go when completed

ACTIVITIES

1. Have each student fill out the work permit form and then discuss them in class. (Obtain form from Department of Labor and Industries.)
2. Have a guest speaker from the Department of Labor and Industries explain work permits.

UNIT II - JOB PLACEMENT
Part 5 - The Personal Data Sheet (Resume)

Length: Open
Prerequisite: Completion of Parts 1 and 2.
Description: Writing a Personal Data Sheet
Objective: Each student will be able to design a Personal Data Sheet including all the concepts covered in this part that best exemplifies himself to a prospective employer.
Sources: You and Your Job, Blackledge, 1967, page 42.
Marketing and Distribution, Mason and Rath, 1968, page 544.
Salesmanship Fundamentals, Ernest and DaVall, 1968 page 449.
Retail Merchandising, Wingate and Samson, 7th Ed., page 593.
Retailing, Richert, 5th Ed., page 566.
Your Job in Distribution, Beaumont and Langan, 1968, page 290.
The Job You Want, Andrews, 1968, page 79.

OUTLINE

I. The Personal Data Sheet
  A. What it is
  B. Why have one
  C. What is needed on it
    1. Personal information
    2. Work experience
    3. School information
    4. Hobbies and interests
    5. References
  D. Neatness

ACTIVITIES

1. Have all the students write Personal Data Sheets and submit them to your Advisory Board Chairman or members for the evaluation and suggestions. (Handouts 1 and 2).
2. Collect creative and unusual Personal Data Sheets and exhibit them for other students.
3. Have a guest speaker from your business community relate his feelings about students with and without Personal Data Sheets when they interview at that particular firm.

UNIT II - JOB PLACEMENT
Part 5 - The Personal Data Sheet
Handout 1

How Do You Present Yourself To A Prospective Employer?

I. You have already done some groundwork. You have:
   A. Thought about the kind of job you want.
   B. Inventoried yourself to see what personality traits, education, and experience you have to offer.
   C. Done some checking to find out where jobs are, where you should apply and how you would get to work if you had a job.

II. How do you present yourself?
   A. Using the personal evaluation which you wrote down in draft form, prepare a "Resume".
   B. A well-prepared resume is absolutely necessary: employers expect it.
   C. Your resume is a carefully drafted summary of everything about yourself that is pertinent to employment.
   D. You leave your resume with the prospective employer; it is the most important part of the "impression" you leave with him.
   E. Let's see how a resume is put together:
      1. Here is an example of a good resume.(Handout matches transparency)
      2. Notice that the format is clear and readable.
      3. Your resume must, like this one, be:
         a. Free of mistakes
         b. Typed with clean keys, new black ribbon, and preferably on an electric typewriter
         c. Perfect in grammar and spelling
      4. You must type an original for each employer you contact. Your resume will be more impressive if position desired includes the name of the company where you are applying.
      5. Do not fold your resume. Carry it neat in a pee-chee or file folder.
      6. Use good quality paper.
      7. Be concise, but use complete sentences wherever possible.
      8. Include three references. They should not be relatives or former employers. They should be people who have status in the community. Get their permission to use their names. Have their complete names properly spelled, and have complete and correct addresses, including zip codes.
      9. Under work experience, use correct and complete company names and addresses, names and titles of your supervisors.
      10. Under education, tell what you have done and what the result is. Be specific with clear, meaningful statements. Young people should include work experience for which you were not paid.

III. Now, let's work up your own draft of a proper resume.
   A. Use the personal evaluation and inventory which you have already done.
   B. You do not need to use the same format as the example, but be neat and show some logical organization. More than one page is permissible, but not recommended.
   C. Your final resume must be typed perfectly.

UNIT II - JOB PLACEMENT
Part 5 - The Personal Data Sheet (Resume)
Handout 2

RESUME

Name
Address
City & State
Zip Code
Phone

Vocational Objective:

Personal:

Born
Health
Height

Weight
Marital Status
Military Status
Social Security No.

Education

Work Experience:

References:

UNIT II - JOB PLACEMENT

Part 6 - Filling Out The Application Form

Length: Open

Prerequisite: An interest in acquiring a job.

Description: A discussion of successfully proven points in the filling out of job applications.

Objectives: At the completion of this unit, the learner will be able to do the following:

1. Given a selection of typical job applications, correctly complete each application.

Sources:
You and Your Job, Blackledge et al, 1967, page 49-79.
The Job You Want, Andrews, 1968, page 87-112.
Your Job In Distribution, Beaumont and Langan, 1968, page 291.
Retail Merchandising, Wingate, Samson, 1968, page 599.
Retailing, Principles and Practices, Richert, Meyer, and Haines, 1968, page 569
Salesmanship Fundamentals, Ernest and DaVall, 1968, page 446.

OUTLINE

- I. Job Application
  - A. Personal Information
  - B. Employment Desired
  - C. Education
  - D. Work Experience
  - E. References
  - F. Physical Record
- II. Techniques
  - A. Neatness
  - B. Proper spelling
  - C. Correct information
  - D. Legal Signature

ACTIVITIES

1. Do a series of job applications.
2. Give the learner an incorrectly completed application and see how many errors he/she can correct.

UNIT II - JOB PLACEMENT
Part 6 - Filling Out the Application form
Handout 1

APPLICATION FOR EMPLOYMENT

PERSONAL INFORMATION Date Social Security Number
Name Age Sex
Last First Middle
Present Address
Street City State
Permanent Address
Street City State
Phone No. Own Home Rent Board
Date of Birth* Height Weight Color of Hair Color of Eyes
Married Single Widowed Divorded Separated
Number of Children Dependents other than Wife or Children *Citizen of USA Yes____ No ____
If Related to Anyone in our Employ, state name and Department Referred By

EMPLOYMENT DESIRED
Position Date You Can Start Salary Desired
Are you employed Now? If so may we inquire of Your present employer?
Ever Applied to this company before? Where When

Last
First
Middle

EDUCATION	Name and Location of School	Years Attended	Date Graduated	Subjects Taken
Grammar School				
High School				
College				
Trade, Business or Corresp. School				

Subjects of Special Study or Research Work

*What Foreign Languages Do You Speak Fluently? Read Write
U.S. Military or Naval Service Rank Present Membership in Nat'l Guard or Reserve
Activities other than Religious (civic, athletic, fraternal, etc.)
Exclude organizations, the name or character of which indicates race, creed, color, or national origin of members

*This question may not be asked in states prohibiting same.

FORMER EMPLOYERS (List below last four employers, starting with last one first)

Date Month and Year	Name and address of Employer	Salary	Position	Reason for Leaving
From				
To				
From				
To				
From				
To				
From				
To				

REFERENCES: Give Below the Names of three persons not related to you whom you have known for at least one year

Name	Address	Business	Years acquainted
1.			
2.			
3.			

PHYSICAL RECORD: List any physical defects

Were you ever injured? Give details

Have you any defects in hearing? In Vision? In Speech?

In Case of Emergency notify

Name Address Phone

I authorize investigation of all statements contained in this application. I understand that misrepresentation or omission of facts called for is cause for dismissal. Further, I understand and agree that my employment is for no definite period and may, regardless of the date of payment of my wages and salary, be terminated at any time without any previous notice.

Date Signature

DO NOT WRITE BELOW THIS LINE

Interviewed by Date

REMARKS:

Neatness Character

Personality Ability

Hired For Dept. Position Will Report Salary Wages

Approved 1. 2. 3.

Employment Manager Department Head General Manager

UNIT II - JOB PLACEMENT
Part 6 - Filling Out The Application Form
Handout 2

Reviewing the Application Blank

Adapted from "Employment Practice," a
publication of the general personnel department of
the Armstrong Cork Company.

The application blank should be checked prior to the employment interview. It should be checked for completeness, for accuracy and for areas needing further investigation.

The following items should be checked:

A. Identification
  1. Present address (how long? permanent residence?)
  2. Social Security number
  3. Birth date (check against plant or job requirements)
  4. Phone number
  5. Notify in emergency
  6. Height(check against plant or job requirements)
  7. Weight(check against plant or job requirements)
  8. Selective Service classification (verify status)
  9. Reservist(likely to be called into military service?)
  10. Work preference(above or below qualifications?)

B. Work Experience
  11. With regard to actual work record:
    a. does period of experience and education balance with age?
    b. are there any Void periods? If so why?
    c. are at least the last five years covered in detail?
    d. is there evidence of job floating?
    e. do stated reasons for leaving previous jobs need further investigation?
    f. what is the caliber of previous employers?
    g. are there any periods of "out-of-area" employment?
    h. has progress been made in previous employment?
  12. With regard to military service:
    a. was he honorably discharged? (check particularly if discharge was on medical grounds)

  - b. did he progress while in the service?
  - c. if he had a military specialty, what was it?
13. Check previous employment with this company, if any
14. With regard to skill or trade:
  - a. what is it?
  - b. where was it learned?
  - c. duration of learning period?
  - d. length of experience in it?

C. Education

15. General:
  - a. what level of education was attained?
  - b. in how many years? (any evidence of retardation or acceleration?)
  - c. any effort to improve self after completing school?
  - d. quality of school work?
  - e. extracurricular activities?
  - f. reason for leaving school valid?

D. Family Situation

16. Likely to affect work:
  - a. incentive to work and advance?
  - b. stability?
  - c. is home environment desirable?
17. Preliminary company studies show:
  - a. married men preferred to single
  - b. investigate widowed, divorced and separated cases carefully.
  - c. men with dependents preferred to men without dependents.
  - d. men with established homes preferred to men renting rooms or living with relatives.

E. Health

18. The interviewer is not expected to rule on the physical qualifications of the applicants, excepting that he may disqualify them for gross physical impairments.
19. The application and the interview can be used to obtain indications of chronic ill health or disabilities, and these can be called to the attention of the medical examiner.

UNIT II - JOB PLACEMENT

Part 7 - The Letter Of Application

Length: Open
Prerequisite: Completion of Part 2 and a class discussion on the value of letters of application
Description: An explanation of how to write a letter of application.
Objectives: Student will be able to write an Ad response letter and a Cold Turkey letter to the satisfaction of the instructor.
Sources: You and Your Job, Blackledge et al, 1967, page 35.
Salesmanship Fundamentals, Ernest and DaVall, 1968, page 446.
Retail Merchandising, Wingate and Samson, 1968,
Your Job In Distribution, Beaumont and Langan, 1968, page 290.
Business Behavior, Russon, 1964, page 222.

OUTLINE

I. Letter of Application
   A. Let the employer know purpose of the letter.
   B. Using AIDCA show him how your training fits his needs.
   C. Let employer know your personal qualifications.
   D. Your references.
   E. Ask for an interview.
   F. Look over the letter.
   G. Have a friend critically analyze it.
   H. Enclose a Personal Data Sheet.

ACTIVITIES

1. Refer to Unit on Business Communications.
2. Have a selected businessman review the letters written by the class and suggest improvements.

Part 7 - The Letter Of Application
Handout 1

(Example of letter to prospective employer to set up interview and make first impression which will develop interest in the applicant).

"Cold Turkey Letter"

7714 34th Avenue Northwest
Seattle, Washington 98107
September 17, 19( )

Mr. J. Magnate Baskerville
Director of Personnel
Frederick & Nelson
Fifth and Pine
Seattle, Washington 98101

Dear Mr. Baskerville:

I know that your store is always looking for competent, reliable sales persons. I will graduate soon from Sealth High School here in Seattle with a Proficiency Card in Retailing, and I would like very much to join your firm.

During high school I have pursued an academic and business course, earning an overall gradepoint average of 3.2. I have participated in many activities and have had leadership posts in several of them. I have held the same part-time job for the last six years, as a dealer for three newspapers in my neighborhood. I am active in a number of hobbies and activities outside school.

May I call you Tuesday, September 21, to make an appointment for an interview. I am enclosing a personal data sheet for your further information.

Yours Sincerely,

Alfred E. Newman

Enclosure

UNIT II - JOB PLACEMENT
Part 7 - The Letter of Application
Handout 2

Ad-Response Letter

1667 Reutabaga Road
Cul de Sac, Illinios
September 15, 19--

Mr. J. Hagnate Rothschild:
Director of Personnel
Harvey's Little Emporium
Harvey's Hamlet, Illinios

Dear Mr. Rothschild:

In response to your advertisement in today's Cul de Sac Clarion, concerning an opening in your company for a sporting goods salesman, I am enclosing my personal data sheet so that you may review my qualifications for this job.

You will find that I have worked part time for two years in a shop dealing in sporting goods and sportswear, and that this experience enables me to perform all duties of a floor salesman, stockkeeper, merchandise receiver, and assistant buyer.

I have just graduated from East Cul de Sac High School, third in my class of six. I was a member of the Retailing class during my senior year. This class involved working part time and learning conceptual aspects of a career in merchandising. As you will see on my personal data sheet, I was also engaged in a number of high school activities and athletics.

May I telephone you Wednesday, September 17, to make an appointment for an interview.

Yours Sincerely,

Alfred E. Newman

UNIT II - JOB PLACEMENT

Part 8 - Prospecting For A Job

Length: Open
Prerequisite: Completion of previous parts of this unit.
Description: How a person can locate job possibilities.
Objectives: Student will be able to analyze the various methods of prospecting and arrange them into a plan of action he would use while prospecting utilizing at least 12 of those listed on the handout.
Sources: The Job You Want, Andrews, 1968, page 49.
Retailing, 5th Ed., Richert et al, 1968 page 565.
Business Behavior, Russon, 3rd Ed., 1964, page 213.
Retail Merchandising, Wingate and Samson, 1968, page 584.
Salesmanship Fundamentals, Ernest and Da Vall, page 442.
Marketing and Distribution, Mason and Rath, page 537.
You and Your Job, Blackledge et al, 1967 page 1.

OUTLINE

I. Prospecting
  A. Plan of action
  B. When to prospect
  C. Sources of help
    1. Relatives and friends
    2. School
    3. Business Community
    4. Written material
    5. Agencies
    6. Associations
    7. Others

ACTIVITIES

1. Request a speaker from the Employment Security Department and/or a private employment agency.

UNIT II - JOB PLACEMENT

Part 9 - Preparations Before The Interview

Length: Open

Prerequisite: Completion of the parts on the Resume, the application, social security, the work permit.

Description: Preparations that should be undertaken prior to the actual interview.

Objectives: The student will be able to,

1. Dress as he would for an interview and compare and evaluate himself in contrast to the other students in the class.
2. Present a file on himself to the instructor including the two types of letters of application, a personal data sheet, a correctly completed application form, evidence he has a social security number, a work permit blank if needed, written answers written answers to the seven questions that might be asked during an interview and the completed store sample test enclosed with this part.

Sources:

Marketing and Distribution, Mason and Rath, 1968, page 540.
Salesmanship Fundamentals, Ernest and DaVall, 1968, page 43.
Business Behavior, Russon, 3rd Ed., 1964, page 237
You and Your Job, Blackledge, 1967, page 12 and 79.
The Job You Want, Andrews, 1968, page 91.

OUTLINE

I. Preparations before the interview
   A. Check your groundwork
   B. How do you approach a prospective firm
      1. By telephone
      2. In person
      3. By mail
   C. Learn about the company
      1. What type of thing should you know
      2. Where can you get the information
   D. Your Personal Appearance
      1. Boys
      2. Girls
   E. What questions will you be asked
   F. Review the Do's and Don'ts for Mature Job Seekers
   G. Types of interviews
   H. What to bring with you to the interview
   I. Help each other

ACTIVITIES

1. Have the students practice their interviews in front of the class with the instructor as the interviewer.
2. Have advisory committee memter, interested business men, or other

business teachers interview the students away from the school environment and then have that person evaluate the student using the DECA Job Interview Contest Rating Sheet.

3. Use the video tape machine while having the students role play the part of the interviewer and interviewee. Each student should review his taped interview in private or with just the coordinator present. (A picture is worth a thousand words.)
4. Use the Flash Cards, "Applying For A Job". A self-study guide for students. Rath and Mason and Phipps, The Interstate Printers and Publishers, Inc., Danville, Illinios, 61832.
5. Obtain copies of "Job Finding Kit" from the Coordinating Council For Occupational Education.

THE GROUP APPROACH TO JOB FINDING

Finding a job is often easier if it is a group project where we help each other overcome the obstacles between ourselves and the jobs we want. These obstacles are usually self-made, or they exist because we simply don't know how to go about landing the job we want. For a fuller explanation of the group approach to job finding, see Sidney and Mary Edlund's Pick Your Job and Land It, page 291.

Any member may write up:
- a. his experience
- b. type of job he wants
- c. what he is doing to get it
- d. any job problem confronting him

Other members, in discussion:
- a. comment openly and freely on his qualifications, plans, methods
- b. suggest sources of job leads
- c. criticize his letters, presentations, practice interviews
- d. EMPHASIS is on frank and honest criticism

The group approach emphasizes three things:
- a. planning
- b. participation
- c. persistence

Steps to get your job:
- a. Determine what you want to do (find what the field of work requires; dig out your hidden assets for such work).
- b. Prepare your sales presentation (offer a service instead of asking for a job. Appeal to the self-interest of your prospect; be specific about the job you want, your qualifications, and your achievements. Back up every statement of ability with evidence.)
- c. Make a portfolio, resume, and letters of the shotgun or rifle type.

Techniques and advice:
- a. Prepare for each interview. Plan your follow-up.
- b. Turn liabilities into assets.
- c. Look to your future.
- d. All group discussions should be on a merchandising plan . The job-seeker's assets, liabilities, and potential market should be recognized. The job seeker is a piece of merchandise to be sold.

Fundamental Group Policies:
- a. The group is a mutual self-help organization.
- b. Each member makes his own decisions.
- c. A member seeking help must prepare himself as well as possible before discussing his problem with his group. This means that he must have a complete written presentation, at least in draft form. The group will help him to improve on it and make use of it.

UNIT II - JOB PLACEMENT

Part 9 - Preparations Before The Interview

Handout 1

HOW TO FIND AND KEEP A GOOD JOB

Every year thousands of young people apply for jobs. Often the difference between success and failure is how well you, the applicant , follow a few simple rules when seeking work. You should remember that employers shop for an employee much the same as you shop for articles of clothing. In order to be hired, you must possess the qualifications that the employer is seeking.

I. Preparation And Training

Learn how to do something that everyone else can't do such as typing, shorthand, machine operation, mechanical work or other skills needed in business or industry today--a high school diploma helps.

II. Obtain Personal References

Employers usually ask for references as to your ability and character. They contact these references. It doesn't impress the employer if the individuals you list for references don't remember you.

III. Apply At The Youth Opportunity Center: If You Are Under Twenty Two

Approximately one-fourth of all jobs are filled by the State Employment Office. We have the largest employment network in the world. We know of job openings from stockboys to nuclear physicists in all of the fifty states and in foreign countries.

IV. Notify All Of Your Friends, Relatives, And Neighbors That You Are Looking For Work

Approximately one-fifth of all jobs are filled this way.

V. Contact Employers Directly And Apply For Work

Nearly one-third of all jobs are filled by direct contact.

VI. Other

Private employment agencies, union hiring halls, etc., account for nearly one-fifth of all new jobs.

VII. Selling Your Abilities To The Employer

A. Appearance

Be clean and dress appropriately for the job--no wild or fad haircuts and clothes. Employers are generally rather conservative. Employers usually ask for a "clean-cut" young man or lady.

B. Interview

1. Try to make an appointment for an interview. Don't try to apply over the telephone.
2. Apply alone. Employers like people who can stand on their own two feet. Many people have been turned down when the employer liked the applicant but not his friend.
3. Be prepared to give the employer an honest explanation of your abilities, skills, training, and experience. He will find out soon enough if you exaggerate or lie. Be prepared to give names, addresses, and telephone numbers of your references.
4. Don't appeal to the sympathy of the employer by telling him how much you need the job or the money.

VIII. Keeping Your Job

- A. Be prompt to work.
- B. Be sure to notify your employer when you are unable to be at work.
- C. Show an interest in your work and a desire to improve yourself.
- D. Demonstrate your ability to work without constant supervision.
- E. Be interested in what you can do for the employer.
- F. Accept constructive criticism and try to improve.
- G. Be loyal to your employer; don't criticize him.
- H. Don't air personal problems in front of others.
- I. If you have a grievance, talk it over with your supervisor; don't just quit.
- J. Don't try to get off work unless you have a very important reason(emergency)
- K. Keep neat and clean on the job.
- L. While on the job, keep your conversations with your family and friends to a minimum. Also keep your talk about you family and friends to a minimum.
- M. Don't be a troublemaker.

IX. Advancing On The Job

If you want to advance on the job or receive an increase in pay, the surefire method is to find ways to increase your value to the company. A company can't afford to lose a good producer nor can it afford to keep a poor one.

X. How To Quit A Job

Don't get angry and tell the boss off no matter how much you would like. Your next employer will call him before he hires you. Give plenty of notice and leave gracefully.

UNIT II - JOB PLACEMENT
Part 9 - Preparations Before the Interview
Handout 2

ARRANGING FOR AN INTERVIEW

How Do You Make Your First Approach To A Prospective Employer?
How Do You Make First Contact?

I. Employers frequently advertise for help and ask for responses by mail.
   A. They want to eliminate unlikely applicants quickly without a time-consuming personal interview.
   B. They know that they can get a solid first impression of a person through a letter and resume.

II. You place yourself at a disadvantage if you show up to ask for a job without laying the groundwork first.
   A. The employer is more likely to say "no" if you haven't given him any prior information about yourself, if you haven't warned him that you are coming in, and if he hasn't had time to think about you.
   B. A carefully prepared letter and resume is bound to make a better impression than a nervous you, fumbling for the right thing to say in an awkward situation.
   C. Your interview will be much easier and more effective if the employer has a mental picture of you before he meets you. This puts both of you at ease:
      1. The employer, because he can concentrate on just getting to know you.
      2. You, because you know he is at least interested enough to give you the time for an interview.

III. Should you telephone, or should you write for an interview appointment:
   A. Telephone only if the employer so specifies. Many do.
   B. A letter is always the best first contact, if possible. There are basically two types of prospecting letters:
      1. The first type is written in response to a want ad. It states that you wish to apply for the position advertised. It should, however, be aggressive-it should "sell" you. (Teacher: Hand out examples of the ad-response letter. Your next transparency duplicates the handout). Discuss the ad-response letter from the viewpoint of the advertiser. Would he be interested?
      2. The other type is the "cold turkey" letter. It is audacious, but it shows the employer that you have initiative.
         a. A "cold turkey" letter is used when you seek a job that has not been advertised and may not even be open.
         b. Often, you can interest an employer who is not actively seeking help.
         c. A good letter will put you at the top of the list when a job opens.
         d. The best jobs don't have to be advertised, so you may have to use a "cold turkey" letter to get a chance at the job you want.

        - e. (Teacher: Hand out examples of "cold turkey" letter. Your next transparency is the same as the handout.) Discuss the manner in which the letter "sells" you.
    3. When you are composing a memorable prospecting letter, you will doubtlessly feel a bit vain about the statements you are making on your own behalf.
        - a. Don't worry about it, and don't be modest. Just be accurate in a positive sort of way.
        - b. The aggressive, well-written letter will read better than one which carries the modest tone you affect in conversation.

C. If you have to Telephone, how do you go about it?

1. Prepare yourself for the conversation before you call. Make notes on the kind of conversation you expect to have. Since you are calling, the initiative is yours. Here is an example of an outline you might use to guide you during your call:
    - a. This is Alfred E. Newman.
    - b. I am calling in response to your ad in yesterday's Times regarding an opening in your company for a retail selling clerk.
    - c. May I arrange an interview with you and mail you a resume of my qualifications for the job?
    - d. At this point, you give up the initiative in the conversation and your prospective employer takes over. Be prepared to answer questions he is likely to ask, such as:
        - * When can you come in?
        - * How old are you?
        - * What kind of experience qualifies you?
        - * Are you now employed?
        - * Why do you want this job?
        - * How much do you expect to be paid?
        - * What hours and days can you work?
        - * Do you look upon this as long-term employment?
        - * Can you arrange transportation to and from work?
    - e. How would you phrase the answers to such questions so as to cast yourself in the best light? Look deeply into these questions; what is the significance of each; what is the employer trying to find out?
2. Be sure you jot down exactly where, when, and with whom your interview will take place so that you can be punctual.
3. Ask if there is anything you should bring to the interview besides your resume, which you have already offered to mail ahead.

IV. To Summarize:

A. Your first contact is the most important impression you will make.

1. A letter is the best first contact, whether you are responding to a want ad or doing "cold turkey" prospecting.
2. The letter should be carefully written and accompanied by a resume.
3. Sometimes, a telephone call will be necessary. It is more difficult to make a good impression over the telephone than it is by letter. Therefore, prepare yourself before you call.

UNIT II - JOB PLACEMENT

Part 9 - Preparations Before The Interview

TO FIND A JOB:

Step One.

Pick a specific job. Don't look for just anything anywhere. A man's chances jump from bad to good the minute he makes up his mind exactly what he wants to do for a living.

This is because most men who hire men these days don't just put on a crew. Not anymore. These days they look for a specific man to fill a specific vacancy. Once just about any nimble citizen could be a janitor. Nowadays, the top notch janitorial firms-the so-called sanitary engineers-look for experienced hands who know, for instance, what cleaners won't scar plastic tile, what detergents won't discolor natural alloys.

Everything's specialized. So when an employer loses a man these days, he loses a specialist. And when he looks for a replacement, he doesn't just look for any man, he looks for another specialist. Frequently, he'll wait and wait and wait, by passing half a hundred jacks-of-all-trades, until some certain-minded man walks in and says "That's the job I do best and that's the job I want."

If you don't have a specific job in mind, thumb through the classified ads for a few hours and ask yourself: Would I like this kind of work:Would I be good at that? Make some judegments. Can you handle it now? Or could you learn to handle it? Make up your mind; definitely, to be specific. That's step one. It's fact.

Step Two

Put together a one or two page outline of your education, experience, family status and individual statistics-a resume-the kind of thing you're supposed to fill out on job application forms. If you're not sure how to make it out, get help from an employment counselor or a public stenographer. You'll want lots of copies-20 or 50 or 100. It'll cost you a few dollars and if you're looking for a job, you probably can't afford it-but you'd better afford it anyway, because if it gets you on a payroll just one day sooner, it'll have paid for itself.

Submit a copy of the resume to the bosses where you apply for work instead of spending all that time filling out all those job applications. Don't do this just because it means you can visit many more employment offices every day than you could visit without the resume. Those daylight hours are precious. You don't have time to spend all morning and all afternoon hanging around somebody's outer office, filling out no more than two employment applications a day. You should be talking to bosses or employment officers during these hours. Resumes will help make it possible.

Step three

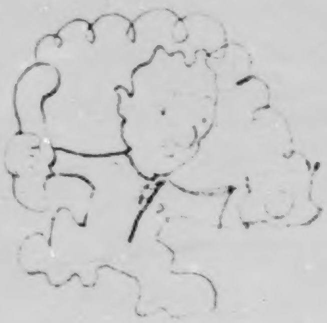
Take a fat notebook or a handful of filing cards and list companies, their addresses, telephone numbers and names of key people such as personnel managers. What kind of company? The kind of companies, obviously, that hire one kind of specialist you are or want to be. Where do you get the names of such comapnies? Everywhere. Check the classified ads. Ask personal people to name them. Ask friends, Ask anybody, anywhere. Ask everybody. You want 10,20,30 or more pages or cards, all filled out with company names. This is your prospect list. You cold-canvass everybody you meet to make a good long list, because as every salesman knows, you can't do anything without it, except by accident or dumb luck.

Step four

Spend a half hour every morning on a telephone-if you don't have one, go somewhere and borrow one-to find out where and when you can go to submit your resume and to talk to the boss. Make definite appointments, if you can. But if the personnel office says, "Drop in anytime," say, "O.K.", and sandwich those calls between the definite appointments. Set up not one or two or three but four and five and six visits with employers each day. (and never leave an employer's office without getting at least one more company name to add to your prospect list.) The best place to get a job is face-to-face with the man who hires your kind of man. Everything you do should be aimed toward putting you in that position, as many times a day as possible, every day. So, in the morning, use the telephone to schedule your day.

Step Five

Record on the notebook or file cards the time and date of every visit, then check back by phone or personal visit just as often as you can without making a pest of yourself, at least a little bit, it'll show them you mean business.



Finally, Facts and Philosophy

These are the facts, but you can't find a job without philosophy, too. So since job hunting is just about the hardest work in the world, here is some philosophy that a man can use to make it all a little easier.

Understand what the old farmer meant when he said, "You throw enough mud against the old barn door and some of it's going to stick."

It's certainly better to dress well, smile, feel confident. But no matter how you've dressed, what your expression, or how uncertain you feel, you just can't stay out of work forever if you do these five things to see enough bosses:

1. Pick a specific type of work.
2. Make copies of a resume.
3. Complete a prospective employers' list.
4. Schedule every day by telephone.
5. Call them back so often as they'll let you.

Thanks to Mike Mailway

HOW TO FIND, LAND, AND HOLD A JOB
THE PERSONAL INTERVIEW

Thesis: How Do I Prepare For A Winning Interview?

I. The personal interview may make you a little nervous, but it is nothing to fear.
   A. On the contrary, you should look forward to it.
   B. You would not be granted a personal interview if the company were not interested in you.
   C. Interviewers are generally the most personable and considerate people in the company. Your interview will probably be most pleasant.
   D. The interview is your chance to show your best personal qualities, the ones that don't show up in your letter and resume.

II. The first thing you should do to prepare for your interview is learn about the company.
   A. The interviewer will be pleasantly impressed when you show knowledge and interest in the company.
   B. Your knowledge will help you to answer questions the interviewer asks.
      1. One of the commonest questions asked by an interviewer is, "why do you want to work for our company?"
      2. Your ability to talk about the company rather than yourself will give you an advantage over other applicants.
   C. What sort of things should you learn about the company?
      1. Find out how long they have been in business.
      2. Know what products or services they provied, and know something about them.
      3. Know if they have expanded or varied their operations recently, and if the company has made any remarkable achievements.
   D. Where can you find out about the company?
      1. The easiest way is to find someone who works there. He may have much personal knowledge, and he can get company literature for you.
      2. Another source is the library.
      3. Another is the company itself. Simply call and tell them that you are coming in for an interview and that you would like to learn something about the company before you come in. You will be pleasantly surprised at how helpful they will be.

III. What about your personal appearance?
   A. A good letter and resume will have given your prospective employer his first impression of you.
   B. But the interview will be the first time he sees you. This is so important that you should give a lot of thought to preparing your appearance for the occasion.
      1. Do you know how you should be dressed? The most important rule you should observe is: Be as inconspicuous and impersonal as possible, while projecting a neat and sincere appearance.

2. This means: (For the boys)
    a. White shirt only (no colors, stripes, or extreme collar styles).
    b. Dark, well-pressed suit (preferably a suit, rather than a sports coat; conservative style.)
    c. Absolutely no white or loud socks. When you sit, be sure not to allow your bare, hairy leg to show between your sock and your pant leg.
    d. No buttons or medallions in your lapel. This is the easiest way to bring on some kind of immediate prejudice against you.
    e. No monogrammed handkerchief in your coat pocket: very bad taste.
    f. Shoes should be shiny oxfords. No loafers, beatle or hippy boots.
    g. And, for goodness sake, be clean. Scrub your hands with a rescue pad and comet if you just changed your transmission the night before. Remember your finger nails, haircut, and complexion.
3. This means: (For the Girls)
    a. Mini-and Micro-skirts are out, as are mother hubbards and whatever else you are currently using to outrage parents and teachers
    b. You should wear, preferably, a simple dark dress; currently stylish, but not extreme.
    c. Heels and nylons of course, Gloves and a small purse are advisable. No purse is even better.
    d. Your hair style should be simple, conservative, and definitely off the shoulder.
    e. Makeup should be adequate, but understated.
    f. No flamboyant or costume jewelry should be worn with the exception of small earrings, perhaps a pin, and perhaps a watch or bracelet. A small necklace will be allright if the dress demands it.
    g. Try to leave your books outside the interviewer's office if you had to bring them along. They don't help your appearance of self assurance.
4. The fundamental code of dress in a retail establishment is to look businesslike, and never outdress the typical customer who is dressed for town. This latter admonition is especially important for the ladies.

IV. How should you act?
  A. First, be on time.
    1. Plan to arrive a bit early. Under no circumstances must you be late
    2. Fairly or unfairly, a late arrival will automatically turn your interviewer against you.
    3. If you have to unavoidably be late, telephone ahead. This is a common courtesy you should never overlook.
  B. Interviewers are frequently very busy, so you will probably have to wait
    1. Don't slough. Sit relaxed and straight while waiting.
    2. Don't twiddle your thumbs, tremble, or nervously finger a watch or piece of clothing. Sit still.
  C. In the interviewer's office:
    1. Even though the interviewer is relaxed and informal, sit straight in your chair.
    2. Answer "yes" instead of "yeah".

3. Be acquainted enough with your own resume to elaborate on questions about it. (When and where did you do such-and-such; what do you expect to do after graduation).
4. Don't put things on his desk unless invited to do so. Don't try to read papers on his desk--they are confidential.
5. Do not chew gum or smoke. If offered a cigarette, refuse, Don't say, "I don't smoke." Such a statement implies that you are passing judgement on another's habits. Just say, "no, thank you."
6. Try to relax and simply be pleasant.
7. Answer questions directly and completely, but don't be garrulous.
8. Your interview will probably be brief. Recognize when it is time to go. Do not offer your own hand for a handshake; that is the perogative of the interviewer. Say thank you for the interview.
9. Do not ask whether you have been hired. If the interviewer wishes to tell you, he will do so. Most likely, he wants time to think it over and compare you with other applicants.

V. What should you bring with you, and what sort of questions should you be be able to answer?

A. Be sure you have your social security card.
B. Have a copy of your resume. You will need it for information when you fill out your application blank.
C. Be able to state what salary you expect. Usually, you can just suggest that you be paid the union rate for a beginner or more if you have some experience.
   Never offer to work for less than the federal minimum wage. Any employer who does not wish to pay you that much will probably be inconsiderate in other ways.
D. Be able to answer the question, "why do you want to work for this company?"
E. Know what transportation arrangements you can make.

VI. Summary:

A story about a fellow job seeker might help to crystallize what we have learned today:

"Alfred was due for an interview at 9:00 a.m. with Mr. Pott, president of Pott's Proven Prunes Company. Alfred decided to wear his new pink shirt with the orange-striped winged collar, magenta and puce paisley foulard cravat, his new black jacket with the gold epaulets, houndstooth check very tight trousers, and suede boots--the outfit which was such a hit with his schoolmates."

"Alfred's father, with his usual carpool timing, could drive Alfred near the Pott Building, getting him there by 9:15. Otherwise, Alfred would have to arise at 5:00 a.m. and pay $1.80 for bus transportation. Alfred, arriving at 9:15, talked readily and easily with Mr. Pott. When he picked up Mr. Pott's desk pen to fill in some parts of the application blank he had overlooked, the pen proved blurry and he remarked that it wasn't a very good pen. His application blank was neatly filled out, however, except that he could not remember the addresses of two of his references or exact dates of two previous jobs. In all other respects, the blanks were completed."

"Alfred offered a cigarette to Mr. Pott before he smoked, and put his cigarette out neatly in Mr. Pott's ashtray. He noted that the ashtray appeared to be unused and was duly impressed with Mr. Pott's neatness. Mr. Pott was interupted once with a telephone call, but Alfred kept himself busy seeing how well he could read upside down some of the papers Mr. Pott had before him."

"Alfred was very favorably impressed with Mr. Pott and the company. Later, however, he learned that a less qualified man had been hired. Alfred decided that the other man had friends in the company and that he, Alfred, had been at a disadvantage in the competition. Do you agree?"

UNIT II - JOB PLACEMENT

Part 10 - During and After The Interview

Length:	Open
Prerequisite:	Complete Part 9
Description:	A study of what one can expect during the interview and what follow-up activities he should carry out.
Objectives:	Student will be able to interview for a job using the techniques prescribed and evaluated by local businessmen. The student will be able to describe to the satisfaction of the coordinator the steps he would use in following-up job interviews.
Sources:	Salesmanship Fundamentals, Ernest and DaVall, 1968, page 450. Business Behavior, Russon, 1964, page 242. Marketing and Distribution, Mason and Rath, 1968, page 543. You and Your Job, Blackledge et al, 1967, page 90. Basic Retailing and Distribution, Reich et al, 2nd Ed., 1960 page 390 Retail Merchandising, Wingate and Samson, page 597.

OUTLINE

I. During the interview
  A. Approaching the firm
    1. Handling yourself in the waiting area
  B. Greeting and meeting the interviewer
  C. What to say and how to say it
  D. Manners
  E. When to utilize the items you brought with you
  F. Let the interviewer lead the conversation
  G. Ask for a call back date
  H. Be ENTHUSIASTIC
II. After the Interview
  A. Analyze what happened
  B. Fill out the Job Application Report (See Coordinator's Guide)
  C. The call back
    1. When
    2. How
    3. How often
    4. Why

JOB APPLICATION REPORT
(To be prepared in duplicate)

Student Name________________________________ Date______________________

Name of Business__________________________ Address_____________________

Type of Business__________________________ Interviewer's Name__________

Interviewer's Position____

Position Applying For____

Why?____

Did you get the job?_______(If answer is yes, copy next word on bed sheet and display prominently.) YIPPEE! (Use red paint.)

Sarting Date______________________ Estimated Weekly Hours______________

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1. Did you visit the establishment with an eye to working there prior to actual date of application?____
2. Did you go in for interview alone?_____________________________
3. CALL-BACK DATE_________________________ BEST TIME__________________
4. What was employer's reason for not hiring you today?______________
5. Why do you think you didn't get the job?________________________
6. To what questions, or information asked, did you have difficulty in responding?
7. Did you feel adequately prepared for this application experience?__________
8. What, if anything, will you do differently on your call-back?__________
9. On your next job application?_____________________________________
10. Are you discouraged? (Circle appropriate answer)
    Yes No

Tips For Keeping A Job

Length: Open
Prerequisite: Desire, on the part of the student, to keep his job.
Description: To give the student a workable list so that he will be able to keep a job.
Objectives: A. The student will be able to list tips for keeping a job.
B. The student will be able to keep a job.
Sources: Business Behavior, Russon, 1964.
Retailing, Richert, Meyer, Haines, 1968.

OUTLINE

I. Understand the Rules
II. Develop Good Work Habits
    A. Punctual
    B. Regular
    C. Work steadily
    D. Follow instructions
    E. Make an honest effort to do your best at all times.
        1. Organize your work
        2. Look for things to do.
    F. Have work done on time
        1. Keep promises
        2. Don't forget your duties
    G. Learn about the job in many ways.
        1. It's your company, too
        2. Take an interest
        3. Accept the status of the job
        4. Be tenacious
        5. Take pride in your work
        6. Be ambitious
        7. Develop initiative
III. Co-Worker Relationships
(refer to unit on human relations)
    A. Understand your co-workers
    B. Win and promote good co-worker relations
    C. Help your co-worker
    D. Win the respect of your co-worker
IV. Why people Lose Their Jobs
    A. Absenteeism
    B. Poor performance on the job
    C. Poor attitudes
        1. Inability to get along with others
        2. Laziness
        3. Disloyalty
        4. Dishonesty

D. Involuntary Termination
   1. Company policy of planning
   2. Strike
   3. Technological unemployment
   4. Seasonal lay-off

ACTIVITIES

1. Have employer discuss with the class what he feels are important work habits.
2. Have students interview employers to determine what they feel are good employee attitudes.
3. Have employers talk to the class about why people lose jobs.
4. Have students interview two businessmen to ascertain why people lose jobs.

UNIT II - JOB PLACEMENT
Part 11 - Tips For Keeping Jobs
Handout 1

HOLDING THE JOB

A. The "Personality" of a Salesman
  1. Definition - A composite of attractive physical appearance and positive character traits which foster the buyer's confidence in the seller and hence in the product.
    a. Attractive physical appearance is made up, in part, of:
      (1) Pleasant facial expression
      (2) Good posture
      (3) Poise, self-control, self-assurance
      (4) Attractive, careful grooming ("It isn't so much what one wears as it is how he wears it.")
      (5) Pleasant voice and correct speech
    b. Some positive character traits are:
      (1) Honesty
      (2) Loyalty
      (3) Tact
      (4) Courtesy
      (5) Memory
    c. You can develop a "sales-winning" attitude if you:
      (1) Realize the need for improvement
      (2) Have a strong desire to improve
      (3) Make a survey of your personality
        (a) Self-analysis
        (b) Rating by others
        (c) Compare the two
      (4) Develop a systematic plan for development
  2. Your most valuable selling asset, personality, will not be complete until you develop a positive attitude:
    a. Toward your job, where you show:
      (1) Honesty, not only with money, materials and merchandise but also with your time and effort
      (2) A willingness to work by readily following directions and working without supervision; by planning your effort and attempting to conserve time through application of work simplification techniques.
      (3) An interest in your job by asking intelligent questions and taking pride in doing a job well.
      (4) Responsibility toward it by being punctual, having good attendance, doing things right the first time(but if mistakes are made, avoid making the same one a second time), and by developing initiative.
      (5) Loyalty to your store--believing that your store is the best in town for the merchandise it carries.
    b. Toward other people, where you show:
      (1) Helpfulness and cooperation by doing things withoug being told and doing all your work, whether you want to or not.

(2) Tolerance and consideration by never taking offense at a customer, regardless of what is said about the store, the service or the merchandise--"courtesy in spite of adversity".

(3) Respect for others by not chewing gum, smoking or eating on the job and not gossipping nor visiting on store time.

UNIT II - JOB PLACEMENT
Part 11 - Tips For Keeping Jobs
Handout 2

Tips For the New Employee

1. Have an "open mind." Be ready to adapt to new ideas and methods. Don't ever think you have the only and best way to do things.

2. Be courteous to everyone with whom you come in contact, your employer, the customers, your co-workers.

3. Be tactful in your speech and mannerisms. There are many ways of saying the same thing. For harmonious relationships with others, think before speaking.

4. Be dependable. Your employer expects you to be there on time.

5. Accept responsibility. When you are given responsibility, show your employer you are grown up enough to "take it".

6. Tell your relatives and friends you are not to be visited while you are working. This applies to telephone calls as well as to visits in person. Extreme emergency would be the only excuse acceptable for the interruption to your work and disturbance thereby created.

7. Continuous personal development is essential to everyone in business. Take advantage of every opportunity to improve yourself.

8. Keep a close check on your personal appearance, health and speech. These are your own tools for your work. Remember you are always dealing with the public. The creation of a good impression is necessary.

9. Keep yourself occupied at all times. If you have a job, do it. If you don't have a job, create one.

10. Make a decided effort to get along with your superiors. You are the one on probation, not they.

11. Take criticism without resentment and learn from these constructive comments.

12. Do your work sincerely and seriously. Work as hard as you can.

13. Don't gripe. Everyone has his own troubles and very few, if any, are interested in yours. If you have a legitimate complaint, do something about it, don't just complain.

14. Don't make excuses. Rather, think of ways to do it correctly. Chronic excuse-makers are rarely believed.

15. Don't gossip. It is a time-waster. And remember, the one who gossips with you

will gossip about you.

16. Don't be a clock-watcher. The person who gets ahead is the one who does more than is expected of him. This applies to time as well as work.

UNIT III

PERSONALITY IMPROVEMENT

Part 1 Physical Traits Of Personality

2 Character Traits Of Personality

3 Social Traits Of Personality

4 Mental Traits Of Personality

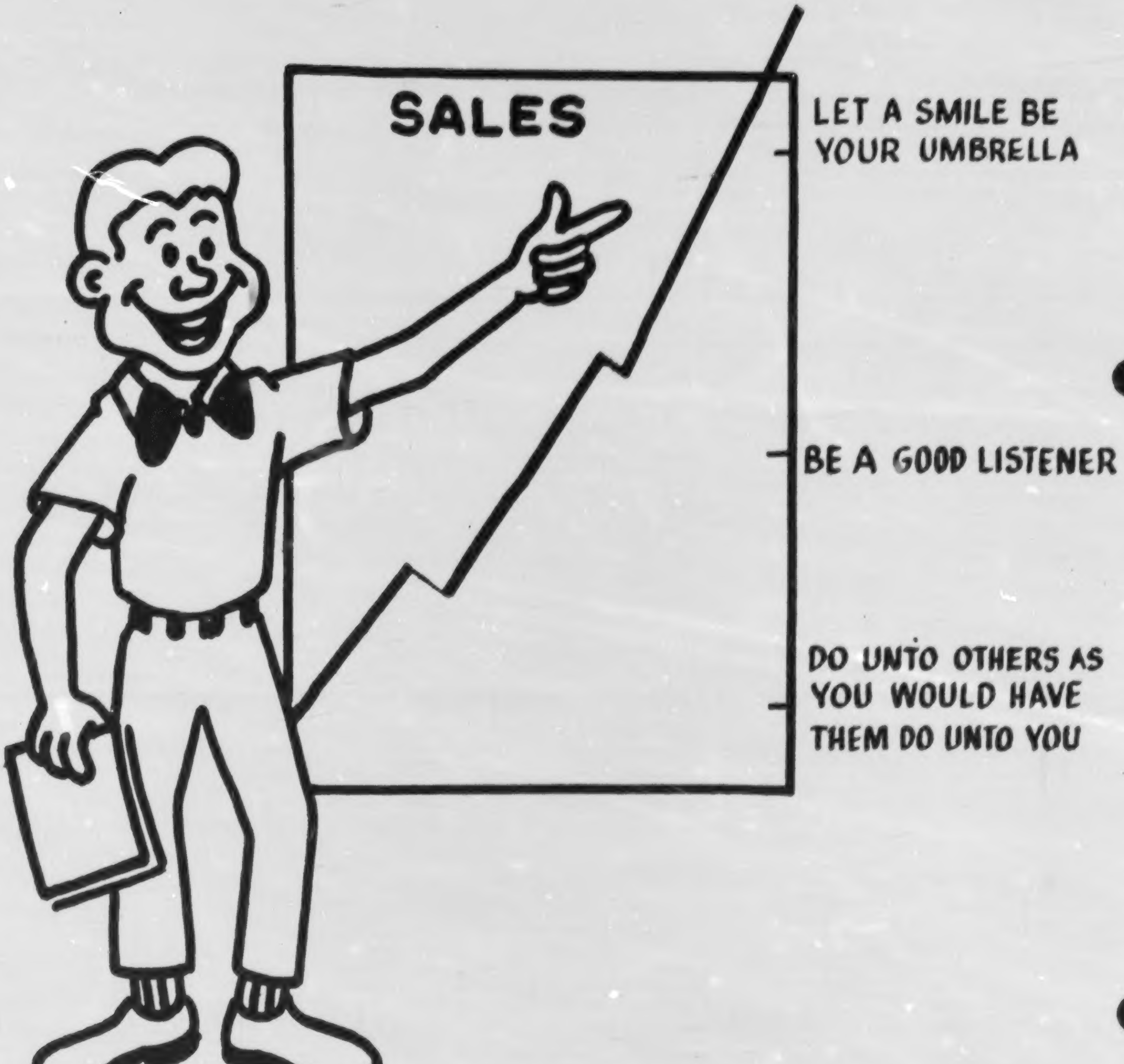
5 Need For Personality Change

NOTE TO INSTRUCTOR

Personality improvement is a difficult area to teach to students. The teacher should try to explain to the students that the teacher is not trying to pry into their personal lives, but that if they will try to be patient and understanding, throughout this instruction, it may save them from being expelled from a future job.

The case studies enclosed represent only a few of the many case studies that are available.

PERSONALITY IMPROVEMENT & HUMAN RELATIONS


SALES
LET A SMILE BE YOUR UMBRELLA
BE A GOOD LISTENER
DO UNTO OTHERS AS YOU WOULD HAVE THEM DO UNTO YOU

UNIT III - PERSONALITY IMPROVEMENT

Part 1 - Physical Traits Of Personality

Length: Open

Prerequisite: A Teacher-pupil discussion, a guest speaker(Personnel Director, Manager or Owner of a Business), or a teacher lecture emphasizing personality as an asset in furthering one's life's goals in a career in Marketing and Distribution.

Description: A study of what constitutes personality

Objectives: A. Physical

At the completion of this lesson, the student will be better able to display the importance of health and personal hygiene in his daily life.

1. Throughout the school year, by teacher-employer observation, the student will display better posture.
2. Student will be better able to demonstrate, throughout the school year, that bathing regularly, keeping body and breath free from offensive odors, and having a healthy look is important in winning friendships and functioning successfully in society.
3. Student will be better able to have the best health possible, throughout the school year, by applying his knowledge of good eating, sleeping and other health habits.

B. Appearance

At the completion of this lesson, through employer-teacher observation, student will demonstrate that proper dress and good grooming improves his person both in school and on the job.

1. Student will be better able to dress correctly according to the situation.
2. Student will wear clean clothes at and on the job.
3. Student will practice modern hygiene and grooming in regard to bright, sparkling teeth, clean fingernails, washed, shining hair and the correct amount of makeup.
4. Student will be better able to understand why proper dress and good grooming improves one's personality.

Sources:

Business Behavior, Russon, 1964, page 51-59.
Creative Selling, Johnson, 1966, page 13-33.
Fundamentals Of Selling, Wingate-Nolan, 1969, page 70-76.
Salesmanship Fundamentals, Ernest and DaVall, 1965, page 88-102.
Psychology and Human Relations In Marketing, Hiserodt, 1969 page 13-29
Personal Development For Young Men, Instructional Materials Laboratory University of Texas, 1968, page 3-65.
Personal Development For Girls, Instructional Materials Laboratory, University of Texas, 1968, page 3-95.
Case Studies In Marketing And Distribution, Rath, Tapp, and Mason, 1965.
Your Attitude Is Showing, Chapman, 1964

OUTLINE

I. Physical traits or characteristics of Personality
  A. The outward material form and natural characteristics of the individual
    1. Posture
      a. Posture and bodily movements frequently tell others many things about you.
        (1) Good posture gives the impression of someone neat, bright, alert, vigorous and enthusiastic--a businesslike person.
        (2) Poor posture presents the impression of someone who is slovenly, dull, slow, tired and bored.
    2. Cleanliness
      a. Need for personal cleanliness
        (1) Daily interaction with people requires you to be clean.
          (a) Clean appearance creates confidence.
      b. Concentrate on outward appearance.
        (1) Body must be clean--a clean body can negate many other personal problems.
          (a) Bath at least once each day.
          (b) Use a good deodorant.
        (2) Healthy, glowing skin contributes to an attractive appearance.
          (a) Proper washing
          (b) Proper foods
          (c) Excercise
            ((1)) creates a cleansing effect as blood circulates
          (d) Sleep (six to ten hours as you personally require)
        (3) Your hands are on constant display.
          (a) Scrub daily with good brush and soap.
          (b) Keep nails neatly trimmed.
        (4) Clean and natural-looking hair is an asset.
          (a) Men--long hair may be in; dirty hair is not
          (b) Women--hair styles should complement your appearance and be appropriate for the job.
        (5) As important as a smile is to your personality, it cannot be attractive unless there are clean teeth behind it.
          (a) Unclean teeth cause bad breath.
          (b) Most sales relationships are quite person-to-person.
          (c) Brush teeth daily.
          (d) If necessary, use mouthwash.
          (e) Visit dentist regularly.
        (6) Proper eating habits affect your appearance.
          (a) A well-balanced diet provides for neccessary vitamins and minerals.
          (b) Proper eating habits affect your performance and personality.
    3. Clothes
      a. When you know you look your best you have more confidence-more poise.
      b. Care of your clothes is essential to good grooming.

- (1) Always put on clean underwear and socks after bathing.
- (2) On the job, a shirt or blouse should only be worn once--then laundered.
- (3) Select a wardrobe appropriate for the job you have.
- (4) Select a wardrobe that fits well and that can easily be cared for.
- (5) A prospective employer may look at your shoes before he looks at your face.
  - (a) Keep shoes cleaned and polished.

ACTIVITIES

1. Case Studies numbers 3,8,9.
2. Fill out confidential chart (self Inventory, Activity 1 attached)
3. By using your imagination, show graphically how physical traits affect your personality. Possible activities may include a bulletin board display; a flip-chart presentation; a film, slide, or overlay presentation to the class.
4. Make a chart or bulletin board display of food to be avoided by overweight persons. Make a monthly menu plan for overweight or underweight people. Possible sources are the school nurse, health occupations instructor or a local doctor.
5. Each student keep an individual record of his hours of sleep, and time and quantity of meals. This could then be compared with recommended amounts and checked by the instructor.
6. Interview an employer and write a minimum one page report on the dress code for his employees.
7. Invite a specialist on grooming to speak to the class.

UNIT III - PERSONALITY IMPROVEMENT
Part 1 - Physical Traits Of Personality
Activity 1

Self-Inventory

Fill In the Correct Answer:

1. Is my hair clean?____________
2. Does my hair look neat, shiny, healthy?__________
3. Is my complexion clear and healthy looking?__________
4. Are my teeth clean and shiny?_________Are they in good condition?_______
   Have I had a dental checkup in the past year?___________
5. Are my fingernails clean, well shaped, free from bright polish that is chipped, and from hangnails?_______________
6. Are my hands clean?________
7. Is my neck clean?_________
8. Are my ears clean?_______
9. Is my clothing appropriate?_________Is it becoming?_________
10. Am I positive that my clothes and body are absolutely odorless?_________
11. Did I have a bath or shower this morning or at bedtime?__________
12. Do I hang up my clothes every night?__________
13. Are my shoes polished and the heels in good repair?___________
14. Are my shoes appropriate for business and for school?__________
15. Are my shoulders free from dandruff and from stray hairs?___________
16. Are the clothes I am now wearing in good repair?_______
17. Do my clothes fit well?__________
18. Did I take the time this morning to make the most of my appearance?______
19. Do I look fresh and wide awake?_________
20. Does my face look pleasant?_______
21. Do I exercise to stay trim in size and in good physical condition?_______
22. Am I drinking at least eight glasses of water each day?____________
23. Am I in good health, and do I give that appearance?_______
24. Do I try to look my best at all times, even when alone?_______
25. Would I be considered well-groomed?__________

UNIT III - PERSONALITY IMPROVEMENT
Part 2 - Character Traits Of Personality

Length: Open

Prerequisite: A teacher-pupil discussion, a guest speaker emphasizing how important character traits are in developing a better personality, or a teacher lecture on honesty or character traits.

Description: A study of character traits in developing a better personality.

Objectives: At the completion of this lesson, the student will be better able to recognize and exhibit character qualities which evidence the development of good personality.

1. Student will be able to demonstrate honesty by receiving the trust and confidence of his associates over a period of time.
2. Student will successfully perform assigned duties consistent with his abilities.
3. Student **will** be better able to cooperate willingly with his family, teacher, parents, fellow students, and fellow employees
4. Student will make a special point of being on time at school, and on the job.
5. Student will demonstrate the ability to finish a job begun.
6. Student will be better able to show respect to the person with whom he is dealing.
7. Student will be better able to set goals high enough so his achievements require work.
8. Student will be better able, through his own initiative, to accomplish his goals,
9. Student will be better able to control emotions even when irritated.
10. Student will develop positive attitudes toward all personal relationships.

Sources:

Business Behavior, Russon, 1964, page 141-181.
Creative Selling, Johnson, 1966, page 13-42.
Fundamentals Of Selling, Wingate-Nolan, 1969, page 83-90.
Salesmanship Fundamentals, Ernest and DaVall, 1965, page 65-87.
Psychology and Human Relations In Marketing, Hiserodt, 1969, page 13-29.
Personal Development For Young Men, Instructional Materials Laboratory, University of Texas, 1968, page 71-110.
Personal Development For Girls, Instructional Materials Laboratory, University of Texas, 1968, page 101-136.
General Telephone, Film on Vince Lombardi.

OUTLINE

I. Character traits of Personality
   A. It is much more difficult to develop qualities of character than to develop some physical qualities. Character traits are more difficult to recognize, and their weaknesses vastly more

difficult to admit.

1. Honesty--are you honest to others and to yourself?
   a. At school
   b. At home
   c. On the job
   d. Remember that honesty is a reflection of you!
2. Sincerity
   a. The sincere individual is anxious to please, to be kind and thoughtful and zealous in furthering some desirable end.
3. Self Confidence
   a. Confidence is the belief in yourself that makes others believe in you.
      (1) Know your own ability
      (2) Strive to better yourself
      (3) Don't sell yourself short
4. Ambition
   a. Set a goal high enough so its achievement requires work.
   b. Discover and develop your own special ambitions.
5. Initiative
   a. Initiative is the steady and measurable progress of accomplishing one's ambitions.
   b. The person with initiative looks for new ways, new ideas, new methods and new applications.
6. Loyalty
   a. A loyal person is someone dedicated to a person, an idea, or a belief.
7. Punctuality
8. Courage
   a. Have the courage to stick with problems until they are solved.
   b. Eliminate the word "quit" from your vocabulary.
9. Positive attitudes
   a. Learn to have positive attitudes in all personal relationships.
   b. Always look for the bright side of life.
10. Respect
    a. Service is without value unless it is joined with respect.
    b. By properly respecting the person with whom you are dealing you show appreciation and good judgement.
11. Cooperation
    a. The ability to work smoothly with others.
12. Self Control
13. Dependability
14. Stability
15. Sense of Responsibility
16. Adaptability
17. Appreciation
18. Sympathy
19. Consideration

ACTIVITIES

1. See Case studies numbers 1,2,4,5,6,7.
2. Using graphics (posters, films, bulletin boards, etc) in a group of four or five students, make a visual presentation showing what at least eleven of the character traits visually mean to your group.
3. Take a test on your character traits (see appendices B & C). Have two friends and your parents evaluate you using the same test. Using a blank sheet, tally the results. The student should list ten best character traits he has and the ten worst according to the tally. The student should then write a paragraph telling why he thinks these ten are strong characteristics and why he thinks the others are weak ones. The paragraph should contain ideas as to how to correct the latter.
4. In a brief paragraph or two, write down your attitude toward each of the following subjects: Honesty, Ambition, Loyalty, Cooperation and Consideration.
5. Make a chart of three columns of things you can do as an employee at your training station that would indicate your loyalty to your company, your school, and your Distributive Education program.

UNIT III - PERSONALITY IMPROVEMENT
Part 3 - Social Traits Of Personality

Length: Open

Prerequisite: A teacher-pupil discussion, a guest speaker emphasizing how important character traits are in developing a better personality, or a teacher lecture on honesty or character traits.

Description: A study of correct conduct, etiquette and manners in developing one's social traits

Objectives: At the completion of this lesson, the student will be better able to exhibit mannerisms and social qualities that will evidence the development of improved personality.

1. Student will be better able to extend himself to smile and to be friendly to everyone.
2. Student will be better able to make a conscious effort to be cheerful and pleasant.
3. Student will be better able to extend himself to make others feel comfortable and at ease.
4. Student will be better able to express courtesies to family, friends and customers,
5. Student will be better able to know and use good manners at home, at school, in public, and on the job.
6. Student will be better able to overlook and to forgive the mistakes and faults of others.

Sources: Correct Conduct For Career And College, By Anne Kent, A Guide to 60 Everyday Etiquette Situations and How To Handle Them, 1967, (Provided free by most Business Colleges)
60 Easy Ways To Improve Your Personality, By Esther Eberstadt Brooke, 1965, (pamphlet provided free by most Business Colleges).
6 Ways To Make People Like You, By Dale Carnegie, 1954, (Pamphlet provided free by most Business Colleges)
Business Behavior, Russon, 1964, page 3-183.
Creative Selling, Johnson, 1966, page 13-31.
Fundamentals Of Selling, Wingate-Nolan, 1969, page 88-90.
Salesmanship Fundamentals, Ernest and DaVall, 1965, page 65-87.
Psychology and Human Relations In Marketing, Hiserodt, 1969, page 1-107.
Personal Development For Young Men, Instructional Materials Laboratory, University of Texas, 1968, page 71-110.
Personal Development For Girls, Instructional Materials Laboratory, University of Texas, 1968, page 101-136.

OUTLINE

I. Social traits of Personality
  A. Social graces are highly desirable.
    1. Courtesy
      a. Courtesy is based on respect.

        b. Practice and follow the golden rule.
    2. Tact
        a. Look before you leap--still water runs deep
            (1) Tact involves understanding the other person's needs and wishes.
    3. Manners
        a. Among the greatest assets that a person who wishes to be popular can have
        b. Study rules of etiquette.
    4. Tolerance
    5. Friendliness
    6. Cheerfulness
    7. Sincere interest in people
    8. Sense of Humor

ACTIVITIES

1. Read the pamphlet 6 Ways to Make People Like You by Dale Carnegie and discuss in class.
2. Read the pamphlet 60 Easy Ways To Improve Your Personality, and pick out the 15 that are most important to you and discuss in class.
3. Read the pamphlet Correct Conduct For Career and College by Anne Kent, and list those etiquette situations that you did not know how to handle and discuss in class.
4. See Case Studies numbers, 1,2,4,5,6,7,10.
5. Learn a method in which to remember peoples names.
6. Make a special point of asking someone, each day, of their special interest, and discuss it with him; keep a daily record to be turned in at the teacher's request.
7. Take the "Test for Habits and Attitudes that Antagonize" (Appendix D).

UNIT III - PERSONALITY IMPROVEMENT
Part 4 - Mental Traits Of Personality

Length: Open

Prerequisite: Pre-test on mental attitudes and self inventory (Activity 4,5,6, attached).

Description: A study of mental traits in personality to help student to better understand himself.

Objectives: At the completion of this lesson, the student will be better able to recognize and exhibit mental qualities which evidence the development of good personality.

1. Student will be better able to communicate with peer group, fellow workers and employers.
2. Student will be better able to become a good listener.
3. Student will be able to list the ten steps in the "Nine Easy Lessons in Conversation."
4. Student will be better able to take action quickly in new situations and to quickly handle unexpected difficulties.
5. Student will be better able to form workable mental images of things that are not before him.
6. Student will be better able to recognize and mentally note facts or occurrences.
7. Student will be better able to feel some enthusiasm or excitement in performing some activity.
8. Student will be better able to project own personality into the personality of another in order to better understand him.
9. Student will be better able to evaluate a situation and make the correct decision.

Sources:

Business Behavior, Russon, 1964, page 159-206.
Creative Selling, Johnson, 1966, page 355-356.
Fundamentals Of Selling, Wingate Nolan, 1969, page 86-90.
Salesmanship Fundamentals, Ernest and DaVall, 1965, page 103-123.
Psychology and Human Relations In Marketing, Hiserodt, 1969, page 1-108.
Personal Development For Young Men, Instructional Materials Laboratory, University of Texas, 1968, page 71-110.
Personal Development For Girls, Instructional Materials Laboratory, University of Texas, 1968, page 101-136.

OUTLINE

I. Mental traits of Personality
   A. The mental characteristics of your personality consist of intangibles such as intelligence, attitudes, and moral character.
      1. Language facility
         a. Before you can persuade a person to accept a point of view, a new idea, or your product, you must be able to communicate your ideas and information convincingly.

b. Nine easy lessons in Conversation
    (1) You must like people.
    (2) Don't talk too fast.
    (3) Learn to listen.
    (4) Avoid flat negatives; be positive.
    (5) Don't be bashful; speak out.
    (6) Don't hold center stage too long; let other people speak.
    (7) Watch eye contact - is he with you?
    (8) Be aware of the quality of your voice and its effect on your listener.
    (9) Avoid laying down the law.

2. Resourcefulness
   a. Ability to take action quickly in new situations and to handle unexpected difficulties.
3. Imagination
   a. Power which enables a person to form mental images of things that are not before him.
4. Observation
   a. Mental ability to recognize and note facts or occurrences that happen about you.
5. Enthusiasm
   a. Zest or excitement felt in performing some activity
6. Accuracy
7. Empathy
   a. The projection of one's own personality into the personality of another in order to better understand him.
8. Judgement
   a. Ability to evaluate a situation and make the correct decision.
9. Morality
   a. Conformity to standards of what is right.
10. Organizational ability
11. Memory

ACTIVITIES

1. See Case Studies numbers 1, 2, 10.
2. Discuss five of the mental traits individually with your instructor. Write one or two paragraphs on how these traits can be developed and what their value is on a job.
3. Write an essay on what ways you could use these mental traits in order to stimulate mental growth and conversational ability.
4. By using a tape recorder and a voice rating scale (see Salesmanship Fundamentals) score yourself. Have a friend score your voice on the rating scale and compare the two; write down your weaknesses and what you can do to correct them.
5. Confer with an English teacher about your problem areas in grammar. Ask him to outline your major difficulies and practice drills he may assign to correct them.
6. Make a list of ten of the most common slang terms in use by your age group and the persons you know. Beside each word or term, write a more descriptive and expressive word or term which you would be able to correctly use on the job. Be prepared to discuss in class or turn in.

UNIT III - PERSONALITY IMPROVEMENT
Part 5 - Need For Personality Change

Length: Open

Prerequisite: Pretest with Self Analysis Checklist and Personality Analysis (Activities 2 and 3 attached). Student, give two Analysis sheets to two friends, and two to parents. Tally scores. A teacher-class discussion, or a condifidential teacher-student discussion will emphasize the need for improving areas in the student's personality.

Description: An in depth concentration on changing areas in one's personality.

Objectives: At the end of this lesson, the student will be better able to realize the need to change weak areas in his personality.
1. Student will be better able to see why this change is needed.
2. Student will be better able to see that a change can take place.
3. Student will want to better his personality.

Sources: Business Behavior, Russon, 1964, page 29-32.
Creative Selling, Johnson, 1966, page 31-32.
Psychology and Human Relations in Marketing, Hiserodt, 1969, page 21-29.
"What's the Matter With Harley?", film from Phillips Petroleum, Bartletsville, Oklahoma.

OUTLINE

I. Personality and change
  A. Personality can change.
    1. Through medical science, even certain physical traits can be changed.
  B. Person must want to change
  C. A person must take the initiative for his changes.
II. Methods of Bringing Change
  A. Observe others and identify desirable and undesirable traits.
  B. Professional help
    1. School Counselors
    2. Medical doctors
    3. Psychiatric doctors

ACTIVITIES

1. Using the Personality Inventory Form (Activity 6 attached), determine which traits you are strong in and which traits you are weak in and need improvement.
2. List five other people mentally that you truly like and jot down five likable characteristics about them. Realistically compare these characteristics with your own.
3. Think of five more people you dislike, and list five characteristics that you dislike about them. Use real people, but don't write their names down. Honestly compare these characteristics with your own.

4. From the analysis of the Personality Performance Form (see appendix E) study the 20 characteristics and see how you rate.
   Are you now convinced that change is forthcoming and necessary?
5. Film "What's the Matter With Harley?" Phillips Petroleum, Bartletsville Oklahoma; Atten: Public Relations Department.

UNIT III - PERSONALITY IMPROVEMENT
Case Studies

1. Where do you stand?

Jack Greene and Henry Pearce are bookkeepers for the same firm. Jack has been threatened with discharge because he sent a valued customer a bill for an account that had been paid. Henry realizes the fault is his because, through some error, he failed to record the payment in the books. As Henry has just been promised a promotion as reward for his good work, an admission of his error might jeopardize his standing.

1. What should Henry do in this situation? Why?
2. If you were Henry, what would you say? Is there any way you can explain this error and still keep in your employer's good graces?
3. If you were Henry's employer, what would be your decision? Why?

2. Should you sleep on it?

Mr. Graham, Miss Ross's employer, was infuriated because of a serious mistake in an order sent in by Mr. Yeoman, a salesman on the road. Mr. Graham immediately called in his secretary and dictated a letter discharging Mr. Yeoman. Because Mr. Graham had to leave at once for a meeting, he asked Miss Ross to sign and mail the letter. Miss Ross was aware that her employer was having an off day. Mr. Yeoman was a personal friend of hers, and she knew that up to this time he had been very efficient and well liked, both by his customers and Mr. Graham. Instead of transcribing and mailing the letter, she held it until the next day.

1. What do you think of Miss Ross' action?
2. Should personal friendship enter a business situation of this kind?
3. What chance was Miss Ross taking?
4. Do you think Miss Ross might have been motivated by feelings other than friendship for Mr. Yeoman? If so, what were they?
5. In case Mr. Graham is of the same feeling the next day, what should Miss Ross do?
6. Suppose Mr. Graham comes in the next morning and tells Miss Ross he has changed his mind and that he is going to call Mr. Yeoman to see if he can talk him into staying?
7. Can you think of a more straight forward way Miss Ross could have accomplished the same result?

3. Buy a better comb?

Jim Thurman worked for the shipping department of Hogles Company. He hoped to become a salesman for the firm someday. After two years, however, he was neither given a raise nor promoted. Other men who were no older were transferred to the retail sales department. Finally Jim reported to work, his hair was not neatly combed, his shoes were not polished, his clothes were not pressed, and his nails were not clean. Jim left feeling that his employer should have told him previously that his appearance was not measuring up to the firm's standards. Yet he could not see why it should have been necessary for him to be neat in the shipping room.

1. Do you think Jim was right in thinking that neatness did not matter in the shipping room? Why?
2. Do you feel Jim's employer should have mentioned Jim's lack of neatness when it was first noted? Why?
3. Do you think a person's work can be predicted from his personal grooming? Why?

4. Abusive Language

Louise Ryan is the secretary to a small-town welfare association. Her work is to keep the unemployed individuals satisfied as far as possible and to try to create a feeling of goodwill between the association and those on relief. One day, when she answered the telephone, a man's voice demanded to talk to the head of the association. Louise had never heard language like this and she put the receiver down with a bang. The telephone rang for some time, but she refused to listen again to such talk.

1. What is the correct attitude toward difficult individuals in social work situations?
2. Was Louise behaving in an objective manner?
3. Why do you think Louise acted as she did?
4. What might Louise have done that would have served the association in a better way?

5. No Personal Calls

Ruth McDonald is busy with her work when she receives a personal telephone call from her friend, Harriet. Harriet wants to find out about a weekend trip that is being planned. Harriet is working at her first job. Ruth knows she does not realize that the office is no place for personal calls. Ruth doesn't want to hurt Harriet's feelings, so she tries to be tactful. Finally, she says," Harriet, I must go now. Mr. Maxwell is buzzing me. See you Friday."

1. Do you think Harriet was made aware that she should not call Ruth during office hours?
2. Should Ruth have been more honest with Harriet so she would understand how to behave in the future.
3. Can you think of a tactful way that Ruth could have informed Harriet of the general rule regarding personal telephone calls during business hours?

6. Shyness is Selfcenteredness

Edmund Holmes, a young bookkeeper from a small midwestern town, has found no friends in the office in the city where he is employed. He has been away from home for three years, but he is still homesick. He is very lonely and does not know whether to stay in the city or go back to his hometown. It seems to him that everyone in the office shuns him; they have never asked him to join in any goup activities.

1. Is it possible that Edmund is to blame for the attitude of the others toward him? Why?

2. Assume that Edmund has talked to you about his problem. What would you advise him to do in order to break out of his shell? Be as specific as you can.

7. Job vs. Career

Betty Lawrence is a salesclerk in a dress department. All the sales force in the store is paid a weekly salary. No bonus is paid for the amount of goods sold.

Betty is very industrious and is usually the first to greet a customer. After serving her customers, Betty returns the dresses to their racks. She then keeps busy arranging merchandise or studying dresses that have been recently put in stock. She is always pleasant and courteous.

Ann Clinton, who works with her, tells Betty she is foolish to work so hard when she receives no extra pay. Betty knows that Ann's attitude is characteristic of the feeling of many of the members of the sales force.

1. Is it profitable for Betty to work as she does? Explain.
2. Do you feel that Betty may be rewarded for her work attitudes?
3. If Betty does not receive a promotion, can you think of any advantages her attitude would have?
4. Why do you think the other clerks feel as they do about their work?
5. If you were in charge of Betty's department, how would you handle this situation of indifference on the part of some of the sales personnel?

8. Lack of sleep

Ray Benton works as a junior accountant in the accounting department of a large firm. Ray is ambitious and particularly anxious to make more money than his salary as a beginner pays him. To augment his salary, he keeps books for a number of small firms, doing the work at night and on weekends. He also makes out income tax returns for both these companies and the individuals working in them. Because he wants to keep up with his field, he reads the accounting periodicals at night before going to sleep.

All this activity naturally interferes with his rest; also, he has not taken a vacation in three years, preferring to catch up on his outside work during this period. There is an opening for a senior accountant, and Ray is being considered for the position. Mr. Henry, the controller, has noted Ray's tenseness, his look of fatigue, and his apparent lack of interest in his work. He asks one of Ray's friends if he knows of anything that could be wrong. The friend tells Mr. Henry that Ray is overworking. Unable to understand how this could be so, as Ray's work load in the company is only average, Mr. Henry calls Ray in and asks him what work he is doing. Ray tells him that he wants to make more money and what he is doing to earn it. What would you do if you were Mr. Henry? Follow the five-step problem solving plan to arrive at your decision. (found on pages 56-58 in Business Behavior, by Allien R. Russon, South-Western Publishing Company, 1964).

9. Spend or Save?

Margaret Grover is fortunate in obtaining summer employment in a large office. There is a possibility that if she makes good, she may obtain permanent work later in the same office. The other girls in the office dress better than

Margaret does, and they spend more money for recreation and entertainment. Margaret has been trying to save for further study, but wonders if she should not spend more on her clothes to impress her employer favorably so that she may be considered for a permanent position.

1. If Margaret decides to spend all or most of her money now, how will she benefit?
2. If she decides to save her money, how will she benefit?
3. What would you do in this case? Why?

10. When Business Interferes

Marian Carden, the secretary to a busy executive, has been looking forward to a dinner-dance with Howard Haimes for two weeks, and tonight is the night. At four o'clock her employer brings in a sheaf of papers and tells Marian to return after dinner to type a report. He must have the report completed this evening, as he is leaving on an early morning plane for a distant city. As a result of this trip he hopes to complete a transaction that will mean good business for the firm. He has seldom asked Marian to return to the office in the evening and when he has done so, he has always notified her in advance if possible.

1. Is Marian justified in refusing her employer's request?
2. Is it possible that some other arrangement can be worked out with another typist? If so, who should make the request?
3. If the work demands Marian's particular skill and knowledge, what is her responsibility in the matter if another typist does the report?
4. Is willingness to meet periods of crisis one of the indications of promotional material?
5. Should Marian take into consideration the fact that her employer has been thoughtful and considerate in the past?
6. If Marian is frequently required to work overtime, what should she say when she accepts dates?

UNIT III - PERSONALITY IMPROVEMENT

Activity 2 - Self Analysis Checklist
3 - And Personality Analysis

NAME:

	Always	Usually	Sometimes	Seldom	Never
1. Character qualities					
a. Are you honest in everything you say and do in school; at home; on the job?					
b. Do you work as hard as you can on whatever you undertake or are assigned?					
c. Do you do more than is expected of you in school; at home; on the job?					
d. Do you cooperate willingly with your family; teachers; fellow students; fellow employees?					
e. Do you make a special point of being on time at home; at school; on the job?					
f. Do you take every opportunity to improve and prepare yourself for the future?					
g. Are you always loyal to, and do you speak in defense of; your family; school; friends; employer?					
h. Do you control your emotions even when you are irritated?					
i. Do you keep your word to everyone with whom you have contact?					
j. Are you confident of your ability to do a good job; make a good impression; make people like you?					
k. Are you able to control your moods and feelings so they don't fluctuate between intense hilarity and deep gloom?					
l. Do you feel an obligation to do a thing that someone expects you to do?					
m. Do you defend those things you believe in, even when it isn't the most popular side of an issue?					
n. Are you able to quickly adjust to situations and personalities without being uncomfortable?					
o. Do you think of situations and people in terms of their good points rather than their bad points?					
p. Do you appreciate, and express appreciation, for things other people do for you?					
q. Are you sympathetic toward people who are less fortunate than you?					
r. Are you careful in the way you do things so as not to make additional work for others?					
2. Social Qualities					
a. Do you attempt to be courteous to your family your friends; strangers?					

b. Are you careful about the things you say and do so as not to hurt other people's feelings?					
c. Do you laugh with people, rather than at them?					
d. Do you get as much amusement out of a joke on you as you do when the joke is on someone else?					
e. Are you as interested in other people, their problems and successes as you are in your own?					
f. Do you know and use good manners at home; at school; in public?					
g. Are you willing to overlook and forgive the mistakes and faults of others?					
h. Do you extend yourself to make others feel comfortable and at ease in your presence?					
i. Do you extend yourself to smile and be friendly to people you don't know well?					
j. Do you make a conscious effort to be cheerful and pleasant?					
k. Do you fight against boredom by finding something of interest in whatever you do?					
3. Personal Qualities					
a. Do you sit, stand, walk in an upright manner?					
b. Do you bathe regularly, keeping your body and breath free from offensive odor?					
c. Is your hair, hands, neck, ears, etc., clean and well groomed?					
d. Are your clothes clean, neat, well cared for?					
e. Do you do everything possible to keep your weight at the proper level?					
f. Are your health habits (eating, sleeping, etc.,) designed to give you the best health possible?					
g. Do you keep your voice at a pleasant level?					
4. Mental Qualities					
a. Do you readily remember names, instruction, messages, etc.?					
b. Are you able to improvise, finding ways and means for doing things when the proper equipment is not readily available?					
c. Are you able to mentally see the finished product before you begin creating an object?					
d. Are you able to make a dramatic presentation of an idea or an object?					
e. Do you notice things that go on around you and do you remember that you saw?					
f. Are you enthusiastic about all you undertake?					
g. Are you quick to wait on customers, straighten merchandise, answer questions?					
h. Do you do your work accurately (adding prices, making change, taking inventory)?					
i. Are you able to make decisions objectively, not being controlled by your emotions?					

j. Are you able to organize your work so as to get the most accomplished in the time available?					
k. Can you talk descriptively; grammatically?					

UNIT III - PERSONALITY IMPROVEMENT

Activity 4 - Test For Habits and Attitudes That Antagonize

Habits That Handicap and Attitudes That Antagonize									
	First Check			Second Check			Third Check		
Item Number	Date	True	False	Date	True	False	Date	True	False
46									
47									
48									
49									
50									

Number True ____________________ Number False ____________________

1. I talk too loudly.
2. I make audible sounds while eating or drinking.
3. I use profanity when I am angry.
4. I sometimes appear in public under the influence of alcohol.
5. I pick my nose; I pick my teeth in public.
6. I belch audibly in public.
7. I put my feet up on tables and seats.
8. I hawk(cough) up phlegm and spit it out publicly.
9. I sneeze and cough in the presence of others, without covering my mouth and nose with a handkerchief.
10. I remain seated when talking to an elderly person who is standing.
11. I rush through doors, into elevators, etc., without consideration of the rights and feelings of others.
12. I am egotistic and conceited.
13. I am convinced my opinions are usually the only correct ones.
14. I am habitually too grouchy.
15. I am the "cry baby" type. I "can't take it."
16. I am too quick tempered.
17. I feel that I am inferior to most people.
18. I am too serious most of the time.
19. I am too frivolous and giddy.
20. I am a typical "smart aleck," a wise guy.
21. I am narrow-minded and intolerant.
22. I use foul language, "gutter talk."
23. I yawn audibly and visibly at lectures, in class, or in church.
24. I am a habitual and confirmed gossiper.
25. I am a liar. My word frequently cannot be relied on.
26. I have a habit of tardiness.
27. I am careless and frequently fail to speak to friends and acquaintances.

28. I am frequently sarcastic.
29. I am sometimes dishonest in little ways.
30. I am rude and discourteous.
31. I am usually selfish, thinking of myself first.
32. I am a habitual borrower.
33. I am careless of other people's property.
34. I am stingy - a "tightwad."
35. I talk too much.
36. I am a human clam-don't talk enough.
37. I am usually lacking in tact.
38. I think practical jokes are great fun.
39. I am mentally lazy.
40. I habitually put things off.
41. I am no good as a conversationalist.
42. I am deceitful and tricky.
43. I have no sense of humor.
4 . I have no ambition to succeed in life.
45. I smoke to excess.
46. I drive carelessly.
47. I interrupt other people's conversations.
48. I have little nervous habits and mannerisms.
49. I frequently "pass the buck"; I am unwilling to assume the responsibility for my own acts.
50. I think religion is a "racket" and use every opportunity to criticize the church.

In this test, every answer of "True" indicates a personality defect in the eyes of people of culture. Some defects are naturally more serious than others--but each offends.

If you marked fewer than eight items "True," you are less likely to offend than the average person. If between nine and fifteen statements are "True" for you, something should be done about it soon.

If you marked more than fifteen as "True", you alienate and antagonize people in large droves. You find it hard to get along with friends and associates. You find it extremely difficult to make new friends.

After You Have Taken The Test:

1. In a pocket notebook for easy reference, jot down every item that you marked "True".
2. Analyze these bad habits.
3. Take the one item you think can be most easily remedied and try to remedy it now. When you have concentrated on this for at least a week and attained a measure of success, take the second item, and so on.
4. Keep the list handy and work at your personality weaknesses until you have them conquered.

UNIT III - PERSONALITY IMPROVEMENT

Activity 5 - What's Your Personality Performance Score?

Read the questions below and check your score on a sheet of paper. If the answer is yes give yourself a score of 5: If the answer is no give score 0. Total and rate yourself.

1. Is your voice easy to listen to?
2. Are you a good listener?
3. Are you open-minded;able to see ideas of others?
4. Are you tactful in your dealing with others?
5. Can you make people feel at ease?
6. Can you sit quietly and at ease for at least 10 minutes?
7. Have you a sense of humor?
8. Are you enthusiastic about the things you do?
9. Do you try to break habits that are annoying to others--biting nails, playing with beads, gesturing with your hands, and always adjusting your clothes or hair?
10. Do you work easily with other people?
11. Can you tell a story or give a talk clearly and smoothly?
12. Do you have self-control--refuse to quarrel, control temper?
13. Do you refrain from arguing too much with people who disagree with you?
14. Are you growing gracefully?
15. Do you avoid using your youth as an alibi for a careless look?
16. Do you always look cheerful?
17. Are you sincerely interested in people?
18. Are you dependable?
19. Do you keep the same friends a long time?
20. Do you respect other people's interests, hobbies?

90-100 Excellent 80-90 Good 70-80 Fair 60-70 Poor 0-60 Bad

If you rate below 80, better start working on improving your appearance and disposition.

UNIT III - PERSONALITY IMPROVEMENT
Activity 6 - Personality Inventory

Here are twenty traits without which , though you may have ability, brains, skill, and information, you can hardly expect to succeed in competition with other people. First, grade yourself on the margin, tear off, then give the sheet to your immediate supervisor and ask him to grade you. The rating of the traits are listed below:

Excellent 5%; Good 4%; Average 3%; Fair 2%; Poor 1%; Zero 0%.

1. IS SOCIABLE: Smiles a great deal; gets along with people; and has a keen sense of humor.________
2. IS COURTEOUS: Considerate of other people; gives extra service; and says "Please" &"Thank you." ________
3. SPEECH IS EFFECTIVE: Expresses ideas clearly and convincingly;and speaks distinctly.________
4. Is COOPERATIVE: Helps fellow workers and customers; is willing to assume responsibility; and works for the organization.________
5. HAS INITIATIVE: Makes best use of time; thinks up new ideas; and makes suggestions for improvements________
6. IS AMBITIOUS: Wants the business to succeed; wants to see others succeed; and is a "doer," not a "dreamer."________
7. IS TACTFUL: Says the right thing at the right time; does not argue; and makes the other fellow feel he is doing things his way.________
8. IS ENTHUSIASTIC: Is not afraid of hard work; likes people; and does his job as if he owned the business________
9. IS CONSIDERATE: Makes an effort to see the other fellow's point of view; and is always on the alert to help others________
10. IS ORDERLY: Systematizes his work; keeps things in their proper place; and is a clean storekeeper.________
11. IS HONEST: Must be held in highest confidence; takes responsibility for his own errors; and avoids temptation, bad companions and bad personal habits.________
12. IS DEPENDABLE: Is always on the job; observes company policies and procedures; and does what he is told to do. ________
13. HAS SELF-CONFIDENCE: Believes he can and will succeed; does not know it all; and never alibis.________
14. IS LOYAL: Believes in the company for which he works;knows people who are qualified will be advanced; and observes company policies.________
15. IS INTELLIGENT: Knows what he is doing; knows his merchandise; and makes an effort to learn new methods.________
16. IS ADAPTABLE: Makes adjustments easily; welcomes changes; and judges new ideas on merit rather than by prejudices.________
17. MEMORY: Rmembers and can associate names and faces; is able to retain essential facts; and discards nonessentials.________
18. IS ECONOMICAL: Saves time and effort by being efficient; watches use of supplies, equipment, etc. that are costly; and save his own money as well as money for his employer.________

19. USES JUDGEMENT: Bases judgement on facts; makes decisions on merit; and is noted for sound judgement.____________________

20. HAS PERSISTENCE AND PATIENCE: Does not lose patience easily; tries again and again, and is not easily discouraged.____________________

TOTAL__________ __________

UNIT IV

HUMAN RELATIONS

Part 1 The Importance Of Human Relations .

2 Human Relations At Home, On The Job And In The Community

NOTE TO INSTRUCTOR

Case study No. 10 is the summation of this chapter. This is an excellent Human Relations Problem. Before group or class is assigned this problem, prearrange with one student to stick with decision C found on the last page. A true human relations problem will soon develop.

UNIT IV - HUMAN RELATIONS

Part 1 - The Importance Of Human Relations

Length: Open

Prerequisite: A general knowledge of all the traits of Personality and the desire to get ahead in life.

Description: An in depth study on what human relations are, and the purpose of human relations.

Objectives: At the end of this lesson, the student will be better able to explain the importance of good human relations in business.

1. Student will be able to describe the basic requisites for building and maintaining good human relationships in his business and daily life.
2. Student will be better able to make judgements and act on problems and situations that continually face employees in marketing and distribution.

Sources: Business Behavior, Russon, 1964, page 17-48, 111-126, 141-182, 268-288.
Creative Selling, Johnson, 1966, page 321-342.
Fundamentals Of Selling, Wingate-Nolan, 1969, page 248-251.
Your Attitude Is Changing, E.N. Chapman, 1966, page 2-217.
Psychology and Human Relations In Marketing, Hiserodt, 1969, page 1-12, 30-108.

OUTLINE

I. Human Relations
    A. The art of doing and saying those things that make others think and feel favorably toward you and your business.
II. Importance to the student
    A. Your success in a career in Marketing and Distribution will be determined largely by the way you get along with people.
        1. Over 90% of the people who lose their jobs lose them because of their personality.
III. Purpose of Human Relations
    A. In business, human relations have three important goals
        1. Gaining the cooperation of people
            a. "No man is an island".
        2. Getting workers to produce
            a. High production through better human relations
        3. Helping you to obtain satisfaction from your job
            a. Develop a positive attitude and be flexible
IV. Understand Human Behavior
    A. Human Behavior stems from the utilization or non utilization of your personality traits.
        1. The more you know about yourself-the more you can understand other people.
        2. Empathy

        a. Appreciate others problems
        b. Helps build a strong working relationship between people
        c. Develops you into a better person professionally and socially.

V. Need for Human Relation Study
   A. Size and complexity of modern business necessitates working with other people.
      1. Superiors
      2. Co-workers
      3. Subordinates
   B. Smooth functioning human relationships must exist if our free enterprise system is going to continue.

ACTIVITIES

1. See Case Studies, numbers 1,2,3,4,5,7,8,9.
2. In Buzz Groups, define: human relations, personality, human behavior, "no man is an island," (see part 2).
3. Discuss: Pleasant human relations and unpleasant ones. Give examples of each. How do they differ?
4. Construct a situation in which you were last irritated at someone. Identify which personality traits were the cause. Indicate how a change of these traits could improve the situation.
5. Interview your employer or another local businessman and write a report on the importance he places on positive attitudes on the job and between employer and employee.
6. Discuss: What is empathy? How does it apply to a sales transaction?
7. Each Monday afternoon, make a list of the negative statements you make during a three-hour period. Try to keep the time of day the same each week. Also, after you have become more proficient, make a list of the negative statements you change to positive ones, and finally a list of the positive statements you make. Try to eliminate the negative habit in six weeks.
8. Deliberately choose the most difficult person you know, and begin a campaign to improve your relationship with him or her. Once a week-write the extent of progress you have made. Be sure to date each progress report.

UNIT IV - HUMAN RELATIONS

Part 2 - Human Relations On The Job, At Home, In The Community

Length: Open

Prerequisite: A general knowledge of the importance of human relations.

Description: An in depth study of students'relationship with his employer and training station, relationship with fellow employees, relationship with customers, and his relationship with school, community and family.

Objective: At the completion of this lesson, the student will be better able to demonstrate good human relations on the job, at home and in his community.

1. Student will be able to differentiate between structured and unstructured human relations and apply these on and off the job.
2. Student will be able to more effectively communicate on the job as evaluated by his employer during the school year.
3. Student will be better able to create a good image for his company.
4. Student will be able to cite the three most important traits called for in customer relations.
5. Student will be able to put into effect practice of good human relations in his career in marketing and distribution.

Sources: Business Behavior, Russon, 1964, page 17-48, 111-126, 141-182, 268- 288.

Creative Selling, Johnson, 1966, page 321-342.

Fundamentals Of Selling, Wingate-Nolan, 1969, page 248-251.

Your Attitude Is Changing, Chapman, 1966, page 2-217.

Psychology and Human Relations In Marketing, Hiserodt, 1969, page 1-12, 30-108.

OUTLINE

I. Human Relations on the Job
    A. Relationship of student to employer
        1. Structured human relations
    B. Relationship of student to fellow employees
        1. Structured or unstructured?
    C. Relationship of student to subordinates
        1. Unstructured
    D. Types of human relations on the job
        1. Pleasant Human Relations
            a. Characterized by a smooth interaction between two or more people on the job.
                (1) Job is accomplished in the best manner possible
            b. Requisites for Good Personal Human Relations in Business
                (1) Approach your new job with enthusiasm
                (2) Be friendly
                (3) Ask questions when necessary

        - (4) Do not join cliques
        - (5) Show a willingness to learn
        - (6) Show a willingness to work
        - (7) Look sharp
        - (8) Show appreciation for help
        - (9) Do not be too eager
        - (10) Learn the names of your fellow workers
        - (11) Show an interest in your fellow workers
        - (12) Compliment your fellow workers
    - 2. Unpleasant human relations
      - a. The relationship between two or more people is not smooth
        - (1) Conflict is frequently present
        - (2) Goals are not reached
        - (3) Dissatisfaction is common
  - E. Develop Positive attitudes toward bosses, fellow employees and subordinates
    - a. Evaluate your feelings toward people
      - (1) Empathy--determine why he acts as he does
      - (2) Appreciate his side of the story
      - (3) How does it affect your behavior
        - (a) Why?
        - (b) When?
      - (4) Can you change your feelings?
      - (5) Learn to have positive attitudes toward all personal relationships.
- II. Human Relations and Customers
  - A. No field of work is more dependent on human relationships than the field of marketing and distribution.
    - 1. The good relationship between the employee and his customer is obvious.
    - 2. The three most important traits called for in customer relations
      - a. Tact
      - b. Courtesy
      - c. Respect
    - 3. Learn to be more interested in others than in yourself
      - a. Help your customer feel important
      - b. Be adaptable
        - (1) Be able to respond to changing conditions
      - c. Learn to cooperate
        - (1) Go out of your way to help a customer
      - d. Be generous
        - (1) Give your customer all the time and attention he requires.
      - e. Show initiative
        - (1) Think of new methods of reaching your customers
        - (2) Seek out new customers
        - (3) Learn your merchandise so as to further help your customers.
      - f. Be honest
        - (1) In selling you must be trustworthy
      - g. Be polite

III. Human relations at school, in the community and at home
   A. Relationship of student to teachers and staff
      1. Structured human relations
   B. Relationship of student to friends at school
      1. Unstructured human relations
   C. Relationship of student to neighbors and community
      1. Structured and unstructured human relations

ACTIVITIES

1. See Case studies number 1,3,4,5,6,7,8,9,10.
2. Guest Speaker: Have a businessman talk to your class about a problem that faces him and causes a conflict between the employee and management or another employee.
3. Role Playing: Role play a situation where a problem exists between:
   1. An employer and employee
   2. Co-workers (You need the students to act this out).

   Discuss both points of view.
   Example;
   Scene: Two employees are having a coffee break together. Both employees do not care for each other.

   One employee: You work in a small store with ________, but she is always the one to leave on time, leaving the clean-up work with you. After several months you are getting tired of this and you figure out at coffee this morning that you are going to "have it out" with her. From now on she will have to do her share of the "dirty" work.
4. Buzz Session: What kind of a personality should a salesman have?
5. Critical Incidents: List those incidents at work which caused you to feel bad or good toward co-workers. Have class discuss methods in which the incidents could have been avoided.
6. Buzz Session: Define - Tact, Courtesy, Respect, Patience, Structured Human Relations, Unstructured Human Relations.
7. Discuss: Pleasant human relations and unpleasant ones. Give examples of each. How do they differ?
8. Give examples of persons at work who possess tactfulness and patience. Tell how people respond to each.
9. Explain: Lack of courtesy can cost a sale; bad customer relations can cost you your job.
10. Final Tests and Review (Tests 1,2,3 attached).

UNIT IV - HUMAN RELATIONS
Part 2
Final Test #1

(INTER-PERSONAL RELATIONS)

Name: ______________________ Date: ______________

Score: ______________

1. You will be hired not so much for what you know but for your willingness to learn and your willingness to work. Do you agree with this statement? Explain your answer.

2. Failure to listen is the cause of a great many employee problems. How can you improve your listening ability?

3. Most employers encourage employees to ask questions. Why?

4. Is it human relations smart to openly admit your mistakes? Explain your answer.

5. Teasing and testing is common where people work together. Why does this occur? How would you react to these conditions?

6. The employee should not expect menagement to provide monetary rewards every day, week or month to keep his personal productivity at a high level. He should not expect to be consistently counseled into becoming a high producer. He should not expect to be pampered into doing better work. Do you agree with this statement? Explain your answer.

7. How do you interpret the phrase, "Shape up or ship out?"

8. Explain in your own words what you think is meant by, "Inter-Personal Relations."

9. Most business executives agree that human relations problems are the biggest single factor contributing to loss of customers, loss of sales and loss of profits. Would you agree that "Do unto others as you would have them do unto you" could minimize, if not eliminate, most human relations problems? Explain your answer.

10. A fellow employee has just told you that another checker was given a 50¢ an hour raise. You have been employed as long as this other checker. What course of action would you take?

11. A customer accuses the store of deliberately short-weighing meat. What would you tell this customer.

12. What is meant by a positive attitude?

13. What will you do when hired as a checker, to improve the human relations environment of the supermarket where you will work?

DO NOT WRITE BELOW THIS LINE, FOR INSTRUCTORS USE ONLY

Attendance: Days Late ______________ Days Missed ______________
Cooperation: ______________
Enthusiasm: ______________
Employee Relations: (Role Playing) ______________
Customer Relations: (Role Playing) ______________
Personal Appearance: ______________

UNIT IV - HUMAN RELATIONS
Part 2
Review Test #2

1. Define the physical traits of human relations.

2. Discuss what kind of personal cleanliness should a person practice to be appealing to other people.

3. How do eating habits effect your appearance?

4. Be able to discuss either pro or con what you feel about the statement - "When you look your best, you feel your best."

5. Several character traits of personality were outlined in class; Be able to define and identify these traits.

6. In the brochure by Dale Carnegie "6 Ways to Make People Like You" be able to discuss the one you need to work on the most and how you will try to accomplish your goal.

7. Define the mental traits of personality.

8. Be able to identify six of the seven easy lessons in conversation.

9. Define the following traits as relating to mental parts of your personality.
   a. Judgement b. Imagination c. empathy d. Morality e. Enthusiasm
   f. Resourcefulness

10. Discuss Personality and Change
    A. Do you need a change in yours?
    B. How changes come about.
    C. Can others change it for you?

UNIT IV - HUMAN RELATIONS
Part 2
Final Test #3

1. You will be hired not so much for what you know but for your willingness to learn and your willingness to work. Do you agree with this statement? Explain your answer.

2. Is it human relations smart to openly admit your mistakes? Explain your answer.

3. Most employers encourage employees to ask questions. Why?

4. Teasing and testing is common where people work together. Why does this occur? How would you react to these conditions?

5. How do you interpret the phrase, "Shape up or ship out?"

6. The employee should not expect management to provide monetary rewards every day, week or month to keep his personal productivity at a high level. He whould not expect to be consistantly counseled into becoming a high producer. He should not expect to be pampered into doing better work. Do you agree with this statement? Explain your answer.

7. A fellow employee has just told you that another checker was given a 50¢ an hour raise. You have been employed as long as this other checker. What course of action would you take?

8. What is meant by a positive attitude?

9. If you would be hired to improve human relations where you work or worked, what would you do and how would you go about it.

UNIT IV - HUMAN RELATIONS
Case Studies

1. Think and Discuss

Doris and Jane both work in an office operating business machines. Ann just started on the job and would like to learn how to operate the machines. One day Doris was running a computer and Ann was watching. Ann asked a question about the machine and Doris told her that she would have to go to school to learn how to run the machine.

A few days later Jane was running the machine, and while doing it, explained the principles of operation to Ann and showed her the first step of operation. Later, Doris said to Jane, "Why did you want to show her how to run the computer? First thing you know she will be taking your job from you. You have to watch out for yourself."

Bob and Ray are co-workers at Smith's hardware. Bob is the younger of the two, and Ray has been asked to train Bob. Two days ago, Bob was completing a large sale to a customer when Ray come up to assess Bob's progress. Bob was making a very small error in writing up the ticket; it was the type error that could have been corrected after the sale was completed and the customer was gone. Ray broke in and told Bob about the error he was making and humiliated Bob in front of the customer. Ray finished the sale and rang it up on his key of the register.

Karen and Ed worked in the same department. He could hardly keep his eyes off her. She was a real doll--blond hair, blue eyes, sharp little figure. Ed finally got up nerve enough to ask her for a date, and she accepted. They went out that Saturday and danced until two in the morning. While they were parked outside Karen's home, Ed suggested that they stay away from each other on the job and see each other only on their free time. They would not have lunch together or take their work breaks together. Business is business. Romance is romance. Karen agreed. Do you think they were smart to look at it this way?

Randy had been on his job for a full month. When his girl friend asked him how he liked it, he answered, "The job is O.K., but I wish I had more to do. I do everything I'm told, but it seems that I just sit around about half the time. Time drags. Frankly, it's sort of boring. It's a job, but that's about all. It's all right until I find something else."

What do you think of Randy's attitude about the job? What could he do to make the job more interesting?

"The Business Attitude Gap"

Employer Employee relations

Dan Larson and Ed Garton are high school Distributive Education student-learners, both employed at R.L. Colton and Company, a nationally known chain variety store. Both young men started in the stockroom, and now Dan is in charge of refilling stock for the housewares section when he is there, while Ed is working mainly in the hardware section. Mr. Seely, the store manager, likes both boys and is pleased about their progress on the job; however, he has noticed a big difference between the attitudes of the boys.

The store tends to operate on an informal, first-name basis. The boys knew before too long that Mr. Seely's first name is "Bill," the assistant store manager's name is "Don" Cantor, the head of the hardware section is "Ray" Martin, and the housewares section manager is "Bess" Shoemaker.

The first day the boys were on the job at their new training staion, Ed seemed to fit himself right into the situation. He said to the store manager, "I sure hope I can do a good job for you as a D.E. student, Bill."

Later, when Mr. Seely introduced Ed to his training station sponsor, he said, "Ray, this is Ed Garton, our new D.E. student-learner who will be in your section. Ed, this is Mr. Martin, your training station sponsor."

"How do you do, Ray, I'm looking forward to working with you," Ed stated cheerfully. It did not take Ed more than a day to know, and call, almost every store employee by his or her first name.

Ed was a real personality boy and seemed "at home" in the store almost immediately. Everyone seemed to like him. Ed was personable and likeable and could easily joke with everyone. Soon, when the situation arose, he would playfully poke fun at his co-workers. He was quite a wit, could be mildly sarcastic and laugh easily at others' mistakes. He began to find fault with and chide other employees about not working as efficiently as he; in fact he was quick to offer any corrections or suggestions he deemed appropriate.

Dan, on the other hand, addressed his superiors as "MR" or "MRS" and called only his fellow workers by their first names. One day the assistant store manager told him that he did not have to say, "Mr. Cantor," but could call him by his first name. Dan liked this idea but still addressed the section managers as "Mr." or Mrs." The people who knew Dan liked him; however, since he was somewhat shy, not everyone was aware of his presence. Usually, he went about his work quietly in a business-like manner.

Key Items to Review:

1. What influence might Ed's "needling" have on his co-workers and supervisors?
2. What reasons might Ed have for his behavior?
3. Is the respect that Dan shows his superiors a good idea? Why? Could there be any side effects that are not good? What might they be?
4. What reasons might Dan have for his behavior?

Questions to Discuss:

1. Should Ray Martin talk to Ed about his behavior? What might he say?
2. Should Don Cantor say anything to Dan about Dan's attitude? What might he say?
3. Should the Distributive Education Coordinator say something to Ed and Dan concerning their behavior? What might he say to each boy?
4. In what ways might Ed improve his business attitudes?
5. How might Dan improve his business attitudes?
6. In your opinion, which boy might have more management potential at this time? Why?

3. Use of Initiative

George Andrews has just completed a report that must be sent out in the afternoon mail. His employer intends to send a letter with the report, but he is called out of the office just before closing time and without having been able to dictate the letter. He says nothing to George before leaving. George knows, however, that the letter will be similar to the one sent the previous month. He decides to type the letter and sign it with his employer's name and his own initials.

1. What would you have done in George's position?
2. Which would be more serious, sending the letter without being told or sending the report without a covering letter?
3. If you were George's employer, how would you react to having an employee act in this way without instructions?

4. A Place For Sensitivity

Ann Madison is a secretary in a large plastic surgery clinic. Her task is to fill out routine records concerning patients for the files. The data are of a factual nature and contain no medical information. When talking with a middle-aged man, she observed that he was embarrassed by having to supply such information as his name, age, address, and business. When she had recorded these answers, Ann said to the patient, "And now will you tell me why you have come here?"

"Look, young lady," he answered, "is it the practice for a patient to have to give you that kind of information?"

Ann answered, "I'm sorry, sir. I'm only doing my job. My instructions from Dr. Reynolds are that I must get this information."

1. Do you feel that Ann was sensitive to the needs of others?
2. About what types of needs or feelings are some people very sensitive?
3. Should Ann have insisted that the man answer her question? How would you have handled this situation? Why?

5. The Perfectionist

Betty Varner is a private secretary in the firm of Strong Electronics, Inc. She has been working four years, after graduating from an excellent junior college. Betty's parents were very strict, and she has always been a perfectionist. Her superior, Mr. Bartlett, was a kind, fatherly man, and Betty has worked happily and well. Two weeks ago, however, Mr. Bartlett was transferred to San Francisco and Betty was assigned to his replacement, Mr. Kearny. The new man is brilliant and efficient, but he is somewhat short on patience. He speaks crisply and concisely to everyone. In Betty's anxiety to please, she finds herself making many errors. This fact in itself distresses Betty, but when Mr. Kearny criticizes her work rather sharply, Betty bursts into tears. Mr. Kearny takes her tears in stride, but he becomes extremely irritated with Betty's continued apologies for her previous errors. Finally, he asks the personnel manager to transfer Betty to another office.

1. Put yourself in Betty's place. Is there anything you can do to eliminate

this overly sensitive attitude? Can you detect any causes for perfectionism that are not particularly praiseworthy?
2. What should a beginning worker's attitude be toward criticism? How about the experienced worker? Do you think being able to "take it" will increase or decrease further criticism?
3. If you were the personnel manager, would you tell Betty the reason for her transfer?
4. What suggestions, as personnel manager, could you give Betty to help her overcome her desire for perfection in everything?

"The Case of Bonnie Brite"

6. Customer Relations

Dick Lawson is a retailing student employed part-time at the Big Bargain Supermarket. He is interested in food distribution as a career and he works conscientiously.

One day, Dick and one of the full-time employees, Bob Brown, were bringing out a pallet loaded with merchandise to be put on the shelves in the store. The cartons had been opened earlier and the prices marked at that time. All that the two had to do was to unload the pallet and stock the merchandise on the shelves. This job probably would take them about twenty minutes. As Bob Brown and Dick were rounding a corner, a customer came up and asked them if any Bonnie Brite Cleaner was in stock. There was none on the usual shelf, and she had not been able to find it among the other cleansers. Dick was just about to say that it was at the bottom of the pallet, when Bob Brown, who also knew it was there, blurted out, "No, I'm sorry. We're out of it right now, but it will be back in stock tomorrow. I'm sure you can get it then."

The customer thanked them and walked away. At this point. Dick wanted to call Bob's attention, and the customer's, to the fact that a carton of Bonnie Brite Cleaner was right there at the bottom of the pallet. Dick decided against saying anything, though, because he felt that he might embarrass Bob in front of a customer. After all, Bob Brown is a full-time worker and "knows better" than Dick. There may be a reason behind Brown's action.

Key Items to Review:

1. Is customer service important in business? In what ways?
2. Is maintaining harmony with other employees important in business? Why?
3. Is it more important to give good customer service or to keep good relationships with co-workers? Why?

Questions to Discuss:

1. Should Dick have kept quiet, because after all it was only an inexpensive item? Are even the "little things" important in business?
2. What explanation could Bob Brown have for his action?
3. Should Dick have told the shopper that the item was at the bottom of the pallet? Why or why not?
4. What might the customer be thinking about the store since she is unable to find the merchandise she is seeking?
5. What do you think Dick should have done?

7. Promotional Material

The Home Insurance Company employs two girls as switchboard operators. This position has always been an initial job for girls, who, if they show a degree of proficiency, are transferred to more advanced positions. Judy Graham and Lois Fenton are the two operators. Judy has a slight seniority in time of employment. A position in the clerical force in one of the offices will be open soon, and Judy expects the promotion. It is given to Lois, however. Judy knows that her work at the switchboard has been good. She has always displayed courtesy, has a good voice and clear enunciation, has the essential telephone techniques, and is efficient in her work Lois has all the ability that Judy displays in the performance of duties at the switchboard. In addition, Lois has taken every opportunity to learn facts connected with the organization, has taken on work occasionally to help some other employee, and by judiciously allotting some of her spare time to study, has shown that she has been unjustly treated and decides to quit her position.

1. In what ways is Judy lacking in promotional possibilities?
2. How can this lack be changed? What would you recommend that Judy do first?
3. How would you convince Judy to stay with the company?

8. Is The Customer Always Right?

An irate customer enters a shop with a dress that she has purchased from a salesgirl who said the dress would not fade or shrink when washed. The customer proceeds to vent all her anger on Irene Carpenter, who is taking the other girl's place that day.

1. Is this situation a common happening?
2. If you were Irene, what would you say to the customer? Would you try to handle the situation yourself? Why or why not?
3. If you had been the customer, how would you have handled this situation?

9. Expense Accounts

Sam Little and Harry Dahl are salesmen for the Merchant Company. Their territories are adjoining, and sometimes it is possible for them to spend Sundays together in a middlesized city. To have this meeting, it is necessary for Harry to go twenty miles out of his way. He reasons that the inconvenience caused him is compensated for by his not having to remain in a small town over the weekend. He feels, however, that the extra traveling expenses should be borne by himself. Sam tells him that he is a fool, that the company should pay all of his traveling expenses.

1. If you were Harry, would you charge such trips to your expense account?
2. What are the rules for charging expenses to the company?
3. What regulations have recently been made by the federal government in the matter of expense accounts?

"Company Personnel Problem"

10. Drug Users Arrested

Eleven persons were arrested by police tonight after a surprise raid while the group was involved in drug use. Arresting officer, Robert Girth, told Clarion reporters that one of the students, 26 year old Alvin King, at State University had been under surveillance for several months. Most of those under arrest were from State University. Three of the group were from Allport High School. Judge Evans has released the high school students in the custody of their parents.

District Attorney Richard Ableman said the arrests are part of an intensified effort on the part of the police to limit the widespread increase in drug use in the community. Ableman commented that the economic and personal damage from drug use is more serious than the public seems to realize, and he also expressed dismay that drug use today is becoming more "Matter of Fact and Commonplace" among teenagers today than five years ago.

The Clarion article was accompanied by a photograph showing several youngsters being picked up by the police. Some of the students were attempting to cover their faces, but in the photograph there is one young girl who did not cover her face.

Customer Complaints: Letters

Dear Mr. Hargrave,

I just want you to know that I know the girl that was in the newspaper. She works for you selling clothes on the first floor. What are you going to do about this? I have been your customer for two years. I would fire her if I were you.

(signed) Anonamis

Dear Mr. Hargrave:

I was startled to recognize Paula Lesgail, the young woman in this evening's Clarion, as a saleslady in your clothing department. I am a regular customer, and have purchased clothing at your store for all my children for many years.

Paula has been a most cooperative and helpful salesgirl. My children all like her. I have even trusted Paula by letting her fit the children with school clothing once when I was unable to remain at the store personally. The fact that she is so nice is what concerns me. I am worried about my children liking and looking up to someone who is involoved with drugs and the law. I would appreciate your reply to my letter.

Sincerely,

Mrs. E. Keenan
815 Bonastra Blvd.

Inter-Office Memorandum

Hargrave Department Store

TO: Mr. Sidney Nance
Personnel Director

From: Mr. Hargrave

Subj: Paula Lesgail

Enclosed are pertinent materials dealing with Paula Lesgail. Because Mr. Waller was gone, I saw Paula the morning after the newspaper report. She gave me consent to contact the counseling center. Mr. Waller came in from vacation when he got the news and his report is also enclosed.

I rather liked this young woman, but I realize the decision is up to you.

CH: dl

Report from the University Counseling Center

Dear Mr. Hargrave:

Miss Paula Lesgail has given her consent for us to release to you our clinical impressions. Paula was the source of referral of a young male student at our university, Robert L. Moore. Robert said it was at his girl friend's suggestions that he decided to seek counseling. As part of our interviewing procedures with Robert in February 1970, we also interviewed and evaluated Miss Lesgail. She was quite cooperative. I will quote from my staff's impressions.

Case Worker's Report: Miss Lesgail Comes from a troubled, often broken home. While she loves her mother she says "my mother just can't pick men." Her mother has been married four times and is now divorced. The mother's first marriage was at age 16 and lasted 3 months. Her mother re-married this same man in her third marriage. The other two husbands have been alcoholics. Paula is the second of four children, the child of her mother's second marriage. She has an older brother whom she says she loves. She is worried about him. Paula reports "he has completely flipped out on drugs. He writes these weird letters. Once he came home to us and he had pneumonia and was talking wild. It kills me because when he was growing up he was really great."

Paula was happy for the chance to come in and talk and said "I don't want to rush into marriage with Robert. There is plenty of time for us to get straightened out, and he doesn't know what he wants to do with his life." Paula is currently a student at Allport High School where she majors in General Business. She is also employed by Hargrave's Department Store as a salesgirl. She reports she is very satisfied with her job. (Miss Ella Cain, M.S.W.)

Psychological Testing: Testing shows no evidence of severe emotional disturbance. Stress patterns do appear in her testing, but these should reasonably be expected in view of her background. She has feelings of uncertainty in her relationships with men. She is searching for a secure and stable man on whom she can depend and trust. At the same time she wonders what her own role in such a relationship should be. For example, on the Make-a-Story Test, Paula was given a picture of a young girl who is standing next to a man seated with his head in his hands. She said, "This young girl has come to her father for advice, but she finds him confused and depressed. He has been fired from his job and is afraid that he will not be able to support the family." (Psychologist's question) Does she ever get advice? (Answer) "No, it looks like his problem is bigger than her's" (Psychologist's Question) What did she want the advice about? (Answer) "Oh, it could have been anything. Maybe school problems or dating problems, or maybe she just wanted to talk."(Nice Paroni, PH. D., Clinical Psychologist)

Doctor's Report: I saw Paula briefly after your request for information. She cooperated and came willingly. I want to emphasize that I feel that it was Paula who was instrumental in influencing Robert Moore to quit drugs. I have been working with Robert continuously since February, and I am still seeing him for counseling. Apparently this is what happened. Paula was putting in rather heavy overtime in preparation for the Christmas rush, and also because her immediate supervisor had taken a pre-holiday vacation. Robert became anxious at this sudden withdrawal of Paula's attention. To regain her attention he went to a drug party with Paula and visibly flirted with a co-ed drug user. Paula says she became quite shook up and actually wanted to phone her supervisor but said, "It seemed like a childish thing to do, to phone your boss at night when he is home on vacation." Shortly afterwards, she accepted a marijuana cigarette from a college student right in front of Robert. It was the first time she had ever had a cigarette of any kind. Robert became angry and stamped the cigarette out. They were leaving the party as the police arrived. I think she was only detained for questioning since she was not pushing nor in the act of use. She is a juvenile without record. I doubt whether any charges will be pressed. I feel, it would be an unfortunate misjudgement to terminate her employment. (Sigmund Cortex, M.D.)

Report from Mr. Ernest Waller

Paula Lesgail has been my employee since January 18th of this year. She was actually hired on her 17th birthday. Paula will complete her high school education at the end of this semester. We have talked with her about staying with the store as she does plan on attending State University in this city. Paula has certainly progressed beautifully, although a little shy with the customers and other employees when she first started. I have taken a personal interest in Paula as she has shown an aptitude for the retailing business. She has the flair for it and wants to get ahead. When I ask her to work extra time or to do tasks that are not the most rewarding, she plunges into each duty and I can depend on her. I have been able to give her additional responsibilities in the department as I know she will follow through. She has been extremely grateful for the extra responsibility--as a matter of fact when I left on my vacation recently, I placed Paula in charge of the department.

Occasionally Paula has talked with me at coffee about her boyfriend, Robert, and their plans for marriage. She has seemed to me like a very stable young woman and I was amazed to see her picture in the paper. I came immediately off vacation and contacted her. She said she felt she had shamed me and she cried. I would like to recommend to the Personnel Department that she be given another chance. I would like to see her put on probation for a couple of weeks. I also recommend that she be taken off the sales floor where she would be visible to the customer. I want to spare her embarrassment.

Frankly, from a selfish standpoint, I cannot afford to lose her services this busy time of the year.

Ernest Waller, Manager
Children's Department

Your company must now make a decision. Assume only the following three possibilities are open to you. Make a unanimous decision of the one choice: A, B, or C--that comes closest to your concept of the best decision. You cannot change the alternative. You must pick one.

_______A. Let Paula know that privately the company doesn't think drug taking "is a big deal," and to forget about it. Don't answer the letter from Mrs. Keenan unless she writes you again. Lay low 'til the smoke clears.

_______B. Place Paula on a 30-day probation pending clarification of the outcome of the court proceedings. At that time make whatever decision seems appropriate. For now, ask Paula to take a two-week temporary non-selling job. Mr. Hargrave should answer Mrs. Keenan's letter, thanking her, telling her he shares her concern and letting her know the basis for the action the store has taken.

_______C. Fire Paula immediately. Fire Mr. Waller for hiring her in the first place and send a notice to all supervisors that anyone whose employee is found to be using drugs will be dismissed immediately. Have a full ad printed in the paper about "Why Hargrave's is cracking down on drug users". Obtain copies of the ad and place them in all employees' paycheck envelopes.

UNIT V

SALESMANSHIP

Part 1 Careers In Selling
2 Job Knowledge (Refer to Unit)
3 Prospecting
4 Preapproach
5 Approach
6 Sales Presentations
7 Closing Sales
8 Objections
9 Selling Theories and Techniques

UNIT V - SALESMANSHIP
Part 1 - Careers In Selling

Length: Open

Prerequisite: An interest in the general area of sales as a career goal.

Description: A survey of the kinds of sales jobs that the student should investigate for vocational possibilities.

Objectives: At the end of this lesson, the student will be able to list and identify the major areas of job opportunities in sales.

Sources: Fundamentals Of Selling, Wingate-Nolan, 1969, page 46-54.
Marketing and Distribution, Mason-Rath, 1968, page 13-24.
Retail Merchandising, Wingate-Samson, 1968, page 324-331.
Salesmanship Fundamentals, Ernest and DaVall, 1965, page 30-65.
Retailing, Richert, Meyer, Hains, 1968, 553-574.

OUTLINE

I. Industrial Selling - Selling For The Producer.
   A. Sales engineer.
   B. Manufacturer's sales representative.
   C. Pioneer salesman
   D. Dealer - service salesman
   E. Missionary salesman
   F. Direct salesman
II. Industrial Selling - Wholesalers Of Industrial Products.
   A. General wholesale salesman
   B. Merchandising salesman
   C. Detail salesman - straight, combination
   D. Rack salesman
   E. Truck salesman
III. Retail Selling
   A. Sales clerk
   B. Salesman
   C. Outside salesman
   D. Demonstrators
   E. Telephone sales

ACTIVITIES

1. Select any of the selling jobs from the outline, investigate each job and identify the following:
   A. Personal qualities and characteristics needed for success.
   B. Opportunities for achievement
2. Prepare a three minute talk for the class concerning a specific selling job. Explain advantages and disadvantages.
3. Prepare a one page written report from information gained in an interview with a salesman.

UNIT V - SALESMANSHIP
Part 3 - The Sales Process -- Prospecting

Length: Open

Prerequisite: A general knowledge of the complete sales progess.

Description: A study of the major prospecting methods in personal selling.

Objectives: At the completion of this lesson the student will be able to do the following:

A. Match five appropriate prospecting techniques to each of five products. (Three tangible and two intangible).

B. Define with 90% accuracy a list of prospecting methods.

Sources:
Fundamentals Of Selling, Wingate-Nolen, 1969, page 258-283.
Marketing and Distribution, Mason-Rath, 1968, page 450-451.
Retail Merchandising, Wingate-Samson, 1968, page 337-338.
Salesmanship Fundamentals, Ernest and Da Vall, 1965. page 167-187.
Retailing, Richert, Meyer, Haines, 1968, page 200-207.

OUTLINE

I. Cold Canvassing
  A. Door to door.
  B. Telephone
II. Prospect Lists (external sources)
  A. Classified directories.
    1. Telephone book
    2. City directory
    3. Contacts influential
  B. Newspapers
    1. Want Ads
    2. Birth announcements
    3. Marriage Licenses
    4. Obituaries
    5. Society page
    6. Business news
  C. Organization membership lists
    1. Fraternal organizations
    2. Trade and business organizations
      a. Chamber of Commerce
      b. Junior Chamber of Commerce
      c. Kiwanis
  D. Professional Lists
    1. Almost every trade has an organization of some kind to which its' members belong.
  E. Purchased lists
    1. General line
    2. Limited line
  F. Miscellaneous
    1. Tax lists
    2. Building permits

III. Prospect Lists (Internal Sources)
    A. Referred leads
    B. Former customers
    C. Current customers
    D. In store (walk in) contact

IV. Direct mail
    A. Return card
    B. Return telephone call
    C. Stop in

ACTIVITIES

1. By telephone contact two salesmen and ask each the following question. What is your most effective prospecting method and why? Prepare a short written report on each response.
2. Have each student show how prospecting for sales can be carried on in his training station. Could be done in a group discussion.

UNIT V - SALESMANSHIP
Part 4 - The Preapproach

Length: Open
Prerequisite: A general knowledge of the complete sales process.
Description: A study of the various applications of preapproach methods.
Objectives: At the end of this lesson, the student will be able to do the following:

1. Given a list of 5 items the student will be able to match an appropriate preapproach method or technique which could be used effectivily and efficiently in the sales process.
2. Without the aid of reference he will be able to differentiate between the appropriate preapproach for retail store salesman, in retail selling, and industrial of wholesale salesman.

Sources:
Fundamentals of Selling, Wingate-Nolen, 1969, page 253-283.
Marketing and Distribution, Mason-Samson, 1968, page 450-451.
Retail Merchandising, Wingate-Samson, 1968, page 337-338.
Salesmanship Fundamentals, Ernest-DaVall, 1965, page 167-187.
Retailing, Richert, Meyer, Haines, 1968, page 200-207.

OUTLINE

I. Retailers-Outside Salesman
    A. Prospect Information
        1. Name
        2. Position in Organization
        3. Past Buying Positions
        4. Disposition
        5. Best Time to Contact
        6. Best Method To Approach
        7. Interests
        8. Problems
    B. Methods
        1. Referred lead call
        2. Referred lead letter
        3. Personal letter or note
        4. Phone call
        5. Customer profile card
        6. Return card
II. Retailers - In Store Salesman
    A. Merchandise Information
    B. Customer Information
        1. Needs
        2. Wants
        3. Ability to Buy
III. Wholesale Information Salesman
    A. Territorial Information

   1. Geography
   2. Market Information
- B. Prospect Information (see IA)

ACTIVITIES

1. Answer the following question:
   Why is it important for an outside salesman, especially a traveling salesman to have extensive and accurate information about his prospects?
2. Explain why there is a difference in preapproach information depth between the different selling situations.
3. Do a two minute report on the following:
   a. What specific preapproach is used in your training station?
   b. Does the store's display, advertising and philosophy carry through your preapproach?

UNIT V - SALESMANSHIP
Part 5 - Approach

Length: Open

Prerequisite: A general knowledge of the complete sales process.

Description: A study of the approach techniques available in selling.

Objectives: At the end of this lesson, the student will be able to do the following:

1. List and explain by using examples of five opening statements
2. List and explain the elements in the creation of a comfortable selling atmosphere.
3. Name three techniques to determine customer needs.

Sources:
Fundamentals Of Selling, Wingate-Nolan, 1969, page 292-299.
Marketing and Distribution, Mason-Rath, 1968, page 452-453.
Retail Merchandising, Wingate-Samson, 1968, page 338-339.
Salesmanship Fundamentals, Ernest and DaVall, 1968, page 30-65.
Retailing, Richert, Meyer, Haines, 1968, page 197, 200-205.
Basic Salesmanship, Ernest, 1971, page 55-61.

OUTLINE

- I. Establish a Comfortable Atmosphere
  - A. Appearance
  - B. Basic elements
  - C. Customer types
- II. Opening Statement
  - A. Question
  - B. Curiosity
  - C. Special Interest
  - D. Gift or premium
  - E. Survey
  - F. Service greeting
  - G. Third Party (Referred lead)
  - H. Exhibit
  - I. Merchandise feature
  - J. Acknowledgement
- III. Determine Needs
  - A. Verbal Fact finding
  - B. Questionaire
  - C. In-depth research

ACTIVITIES

1. Compare three poor opening statements and show how they might be improved upon.
2. Record on the video tape a right approach and a wrong approach and have the class analyze each.
3. Go on search for approaches in your business area. Record as many different ones as you can find.

UNIT V - SALESMANSHIP
Part 6 - The Presentation

Length: Open

Prerequisite: A general knowledge of the complete sales process.

Description: A study of the major sales presentation methods.

Objectives: Upon the completion of this lesson the student will be able to do the following:

1. Match the four different sales presentation methods with four appropriate tangible and intangible products of services.
2. Given a reasonable amount of time to prepare, be able to do a sales presentation.

Sources:
Fundamentals Of Selling, Wingate-Nolan, 1969, page 306-330.
Marketing and Distribution, Mason-Rath, 1968, page 441-454.
Retail Merchandising, Wingate-Samson, 1968, page 342-346.
Salesmanship Fundamentals, Ernest and DaVall, 1968, page 239-262.
Retailing, Richert, Meyer, Haines, 1968, page 200-209.

OUTLINE

I. Opening the Sale
   A. Review units III and IV.
II. Sales Presentation Methods
   A. Fact Finding interview
   B. Canned
   C. Impromptu
   D. Sales demonstration

ACTIVITIES

1. Prepare and present a sales demonstration.
2. Invite a tangible and intangible salesman to sell a product to the instructor, prepare a critique for each.
3. Write the name of a product or service on slips of paper. Have students draw a slip and do an impromptu talk on their item. (short)

UNIT V - SALESMANSHIP
Part 7 - Closing Sales

Length: Open

Prerequisite: A general knowledge of the complete sales process.

Description: A study of the rational of closing and an inroduction to the major closing methods and techiques.

Objectives: Upon the completion of this lesson the student will be able to do the following:

1. Define with 90% accuracy a list of closing methods.
2. Given a typical sales interview, determine three possible closing statements or methods which might be expected to successfully close the sale.
3. Given a typical sales interview, demonstrate your understanding of the continuing nature of closing by applying an appropriate closing method or technique at a number of predetermined points in the interview.

Sources:
Fundamentals Of Selling, Wingate-Nolan, 1969, page 346-355.
Marketing and Distribution, Mason-Rath, 1968, page 457.
Retail Merchandising, Wingate-Samson, 1968, page 347-351.
Salesmanship Fundamentals, Ernest and DaVall, 1968, page 297-309.
Retailing, Richert, Meyer, Haines, 1968, page 223-225.
Basic Salesmanship, Ernest, 1969, page 95-104.
Creative Selling, Ernest, 1971, page 67-68.

OUTLINE

I. Closing Methods
   A. Review selling points
   B. Balance sheet account
   C. Closing on an object
   D. Action close
   E. Assumed consent
   F. Premium offer
   G. Price concession
   H. Impending date or event
   I. Limited supply (SRO)
   J. Assumed consent
   K. Choice close
   L. Medical close
   M. Credit close
   N. Application close
   O. Conditioned close
   P. Last chance close
II. Timing
   A. Trial close
   B. Close

ACTIVITIES

1. Select a product and develop a list of closing statements around it.
2. Listen to the sales interview on the cassette. Identify the most logical spots where a closing statement or technique might be applied.
3. Videotape a sales presentation by a salesman. See if and when he attempts to close the sale.

UNIT V - SALESMANSHIP
Part 8 - Objections

Length: Open
Prerequisite: A general knowledge of the complete sales process.
Description: An overview of the major categories of objections, their use in closing, and the timing involoved in overcoming them.
Objectives: At the end of this lesson, the learner will be able to do the following:

1. Differentiate between an objection and an excuse; differentiate between an objection and an interjection.
2. Given a typical sales situation turn a stated objection into a selling point or closing statement.
3. Identify ten statements as either objection, excuse, or interjection.

Sources:
Fundamentals Of Selling, Wingate-Nolan, 1969, page 338-345.
Marketing and Distribution, Mason-Rath, 1968, page 456-457.
Retailing-Merchandising, Wingate-Samson, 1968, page 344-346.
Salesmanship Fundamentals, Ernest, and DaVall, 1968, page 262-285.
Retailing, Richert, Meyer, Haines, 1968, page 87-89.
Basic Salesmanship, Ernest, 1969, page 87-89.
Creative Selling, Ernest, 1971, page 37-38.

OUTLINE

I. Objections
  A. Need
  B. Product
  C. Company
  D. Price
  E. Buying at the moment
II. Excuses
III. Interjections
IV. Timing in overcoming objections

ACTIVITIES

1. Try to sell your instructor some item in front of the class. How many objections can you overcome.
2. Select a product or service and list as many objections as possible which might be uncovered in a sales interview. Now try to overcome each.
3. Interview a professional salesman and ask him to tell you a story about an objection that was turned into a sale, all salesmen will have one. Have the class members report on their responses.
4. Listen to the case recorded in the cassette library. Indicate when the right time was to overcome the objection?
5. Listen to the case recorded in the cassette library. Identify each objection, excuse, and interjection.

UNIT V - SALESMANSHIP

Part 9 - Sales Theories and Techniques

Length: Open

Prerequisite: A general knowledge of the complete sales process.

Description: A survey of some miscellaneous saled theories and competencies. Includes review of the AIDCA stages of sale; also includes plus selling.

Objectives: At the completion of this lesson the student will be able to do the following:

1. Demonstrate the five stages of a sale by doing a mock sales interview.
2. Match an appropriate plus selling technique to each of ten products or services.
3. Interview a local merchant to find out what importance he attaches to plus selling.

Sources:
Fundamentals Of Selling, Wingate-Nolan, 1969, page 356-404.
Marketing and Distribution, Mason-Rath, 1968, page 460.
Retail Merchandising, Wingate-Samson, 1968, page 312-322.
Salesmanship Fundamentals, Ernest and DaVall, 1968, page 347.
Retailing, Richert, Meyer, Haines, 1968, page 197, 229-236.
Basic Salemanship, Ernest, 1969, page 13-16.
Creative Selling, Ernest, 1971, page 40-41.

OUTLINE

I. Sales Theories
   A. Five steps of a sale (AIDCA)
   B. Buying motives
II. Plus Selling
   A. Suggestion selling
   B. Trading in
   C. Increased transaction
   D. Follow up sales

ACTIVITIES

1. Do a mock sales interview from the customers point of view.
2. Interview a professional salesman and determine whether he does or does not believe the five steps theory.
3. Analyze carefully the most recent thing that you bought and see if the five steps theory applied.

UNIT VI

PRODUCT KNOWLEDGE

Part 1 Need For Product Knowledge

2 Type Of Product Knowledge

3 Acquiring Product Knowledge

4 Developing Product Knowledge Into Selling Points

UNIT VI - PRODUCT KNOWLEDGE
Part 1 - Need For Product Knowledge

Length: Open

Prerequisite: A general definition of the term "product knowledge."

Description: A study of the necessity for students having knowledge of merchandise and services they sell.

Objectives: Upon completion of this lesson the student will be able to:
1. Explain, to the satisfaction of the coordinator, the need for product knowledge.
2. List ten reasons why product knowledge is important.

Sources:
Salesmanship Fundamentals, Ernest-DaVall, 1965, page 144-147.
Fundamentals Of Selling, Wingate-Nolan, 1964, page 88-89.
Store Salesmanship, Robinson, Blackler, Logan, 1966, page 160.
D.E. Basic Instruction Series (Advanced Selling), University of Texas, page 93.

OUTLINE

I. Importance of Product Knowledge to the Salesman
   A. To fill the customers needs and wants.
   B. To build self-confidence and enthusiasm.
   C. To give a clear picture of the product.
   D. To be able to answer the customers questions.
      1. Why?
      2. How?
      3. Where?
      4. When?
      5. What?
   E. To Overcome Obstacles.
      1. Hidden values.
      2. Convincing descriptions.
   F. To make work more enjoyable.
   G. To increase earnings.

II. Importance Of Product Knowledge To The Customer
   A. Greater discrimination in buying.
   B. Better choices.
   C. Builds confidence in merchandise.
   D. Better understanding of values and prices.

III. Importance Of Product Knowledge To The Store
   A. Enables the store to buy better merchandise.
   B. Better understanding of customers needs.
   C. The ability to give more instruction and information to sales people.

ACTIVITIES

1. Read "The Hammer Story."(refer to enclosed activity 1)
2. Read "The Good Humor Man." (refer to enclosed activity 2)
3. Students contact employers about the importance of product knowledge.
4. Have salesmen talk to the class on the importance of product knowledge.

UNIT VI - PRODUCT KNOWLEDGE
Part 1 - Need For Product Knowledge
Activity 1 - The Hammer Story

(This story, by Paul W. Ivey, was copied from the book Successful Salesmanship published by Prentice-Hall, Inc.)

Have any of you lost a sale recently--and wondered why the customer didn't buy? For many years I have been analyzing why customers buy and why they don't buy--and I have made an important discovery.

Customers buy where they see the most value for their money. The first principle of salesmanship is to know your merchandise from A to Z, so that you can take the value out of your merchandies and paint a picture of it on the customer's mind.

Many salesmen use glittering generalities instead of Specific points of value--and then wonder why the customer doesn't buy.

I will illustrate this principle by an experience I had in buying a hammer. No matter what you are selling--hats, shoes, automobiles, refrigerators, real estate, insurance, or what not--this hammer story will help you to sell more of your merchandise as I talk about this hammer.

One day some years ago I wanted a hammer. I went into a hardware store and this is about the way the salesman handled me: He put a hammer in my hand, and as I looked at it he said, "That is a mighty fine hammer. That is a real hammer. We sell a good many of those."

I shook it up and down as though I were going to drive a nail, wondering whether I should buy it or one of some others displayed in the case.

He looked at me: I looked at him; then we looked at each other.

After a while he spruced up a little, thought he had better say something more, and said, "That is a mighty fine hammer. That's a real hammer. You can't go wrong on that hammer."

Nothing registered in my mind--no value. But I absentmindedly shook the hammer, balancing it a little and wondered if I had better ask to look at some of the others in the case.

He looked at me; I looked at him; then we looked at each other.

After a while he brought in his final, closing sales talk. He brought in his heavy artillary; the heaviest he had. Do you know what he said? He said, "That's a mighty fine hammer. That's a real hammer. You can't go wrong on that hammer."

I said to myself, "Is that the way they are trying to sell merchandise in the United States of America--the greatest commercial nation in the world?

I decided I would find out. So on my next business trip, I went into over one hundred hardware stores in ten different states asking to look at hammers and not one salesman told me much more about a hammer than was told me in the first store.

A short time after this experience, I went through a large mail order house in Chicago. In those days they had no retail stores and did strictly a mail order business.

The guide took a crowd of us around, showed us many interesting things, and told us many illuminating facts. He also told us the gross sales. I marvelled that a company could reach out with a long arm and pull in all those millions of dollars through a mail order catalog. Finally, a bright idea came to me and I said, "By the way, my friend, you have interested me very much; but at this particular time I am interested in one line of merchandise. What were your gross sales of hammers last year?"

"Hammers?"

"Yes, hammers."

I could see by the way he looked at me that he thought I was crazy. Now it is always a hard thing for me to know just what to do when a person thinks I am crazy so I said, "I can see by the way you look at me that you think this is ridiculous. Of course, I have never had the pleasure of meeting you before, and you have never met me, but, if you only knew it, you are looking at the greatest hammer expert in the United States."

Then he was sure I was crazy.

Well, he didn't know what to do with me so he turned me over to another man. When you don't know what to do with anybody, turn him over to anybody else.

This other man, when he saw that I was very inquisitive individual and wanted to know how the wheels ran in business, he treated me in a wonderful way. He told me more interesting facts, showed me some more interesting things, and finally told me the gross sales of hammers.

"Do you sell all that of just hammers?" I asked.

"Yes," he replied.

"Would you mind letting me look at them?"

"Certainly not."

He brought out four. Ugh! They looked like old friends of mine.

I said, "You will pardon me, but they look like ordinary hammers. How in the world do you sell so many of them?"

And he replied, "Maybe you will find the reason if you look in our catalog."

I went to their catalog, and the sales talk that I am now going to give you about a simple thing like a hammer; I read in that catalog; and if you happen to have the latest edition of their catalog, you will find an enlightening sales talk embodying several changes which they have made in recent editions.

First, "This hammer is nickel-plated."

I said to myself, "Iam sure some of those hammers I looked at must have been nickel-plated."

You say, "Mr. Ivey, when you had those hammers in your hand, and looked at them, couldn't you tell whether they were nickel-plated?"

To tell you the truth, that fact never once impressed itself upon me. All I knew was that they were "Mighty fine hammers; real hammers; I couldn't go wrong on them" whatever that means.

Second, "The handles are mahogany-finished."

"Oh," I said to myself, "Some of those handles I looked at must have been mahogany finished."

You say, "Mr. Ivey, when you had the handles in your hand, couldn't you see whether they were mahogany-finished?"

I suppose I knew it in a general sort of way, but here is a company that does not believe in glittering generalities. They believe in a gull's eye kit. Take the value out of the merchandise and paint a picture of it on the customer's mind, so the latter will want it and pay the price for it.

Third, "This hammer is made of crucible cast steel." Not one salesman told me that. Crucible cast steel! Now an ordinary customer might not know what crucible cast steel is, but he feels it must be some steel. It is.

Fourth, "The faces and claws are tempered just right."

What comes into your mind as a practical person? That is a test of my salesmanship. I know what comes into your mind. You say, "If the faces and claws are tempered just right, I can pull a big spike with that hammer and the claws won't break." Certainly!

Have any of you ever owned a one-claw hammer? Why, as I recall it, I was nearly twelve years old before I knew that a hammer was supposed to have more than one claw. Ours was always broken off.

Fifth, "The claws are split to a fine point."

What comes into your mind?

I know. You say, "I can pull a very fine nail with that hammer." You bet you can. Have any of you ever tried to pull a very fine nail with the hammer at your home and had the nail slip right through the claws? Then you tried again;the same thing happened; then you tried once more and it happened again? Then you paid your respects to the hammer!

Here is a company that says, "You can pull the finest nails with our hammers." They don't say it in so many words; they leave it to your imagination.

Sixth, "The handles are made of selected, second-growth hickory."

Not one salesman told me that. Some salesman did say to me, "That is a mighty fine hickory handle." How fine? Mighty fine. Ugh! I can't grasp that, quite. Mighty fine!

Another salesman said, "This is a real hickory handle." I thought it might be artificial hickory.

Here is a company that says "selected, second-growth." The customer feels that this is not an ordinary handle. They have been selected the hickory for these hammers.

Second-growth! Now what goes through your mind? People who do not know what it is may say to themselves, "Well, I guess it must be very good or they wouldn't say so"; They may even think, "They couldn't grow it good enough the first time so they grew it the second time."

Seventh and final, "The handles are put in with iron wedges so they will not come loose." Does that ring the bell?

Have any of you ever had the head of a hammer fly off? At one time I used to think it was one of the functions of a hammer for the head to fly off.

Do you see this hammer?

"Full nickel-plated, mahogany-finished handle, made of crucible cast steel, faces and claws tempered just right, claws split to a fine point, handles made of selected second-growth hickory, put in with iron wedges so they will not come loose."

Do you see it?

Do you know what I have done? I have gone into a retail store and had a flesh-and-blood salesman put a real hammer in my hand; and I have looked at that hammer with my own eyes; yet I have seen less value in that real hammer when I held it in my hand than when I read about a hammer in a mail order catalog.

I take my hat off to any company a thousand or five hundred miles away that can make me see more value in a hammer when they put a cut of it on paper with a description underneath than I can see when I actually have a real hammer in my hand in a retail store.

And that brings me to one of the most remarkable principles of merchandising and selling; nine people out of ten do not see what they look at. They cannot even see a hammer by looking at it. They only see what they are educated to see. Are you educating your customers to see the full value in your merchandise?

Do you think a person could come into a salesroom and look at an automobile and immediatel see the style lines, the speed lines, the luxurious comfort, the staunch and reliable bumpers, the artistic instrument panel, the performance of the motor? Do you think customers can see anything by looking at it? Don't let's deceive ourselves.

Take the dark glasses off the customer's eyes. Make the picture clear in the customer's mind by telling about specific, definite points of value.

Did you ever wonder why your competitor, with an inferior product, sometimes takes business away from you?

You may have better merchandise for the money than a competitor, but you lose out because your competitor makes the customer see more value in his merchandise.

This is proved by my study of hammers. Do you think that this mail order house has more value in their hammers for the money than all the hammers I saw in a hundred different stores? Do you think they have? Not on your life.

I have seen many a merchant put out of business, not because he did not have better goods, but because he did not know merchandise value himself; and he could not make a customer see what he didn't see himself. He was not a salesman.

Do you ever take it for granted that the customer sees the full value in your proposition? When value is lower than the price, the customer loses interest. When value is equal to the price, the customer feels that he is getting a fair deal.

But--when the salesman builds up value until it is higher than the price, then the customer feels that he is getting extra value--a bonus. Be a creator of value. Leave generalities for the order-taker. Make the picture clear with specific facts.

In short, apply the "Hammer Story" to your merchandise, and you will recognize your sales.

UNIT VI - PRODUCT KNOWLEDGE
Part 1 - Need For Product Knowledge
Activity 2 - The Good Humor Man

In order to illustrate the fact that customers are not able to judge a product by looking at it, and to stress the importance of knowing how to put over merchandise information, I'm going to tell you a story about a man who sells ice cream and popsicles in my neighborhood. Think of this little story in terms of how you sell.

"Joe Thompson was one of those fellows who drives a little white ice cream truck up and down the streets of the neighborhood. He had been doing this for years. Recently, a rival ice cream company sent one of their trucks into Joe's territory and for the first time Joe had competition. 'I can't sell in this territory any longer,' Joe confided in me one day. 'I guess I'll just have to give it up.'

'Why is that?' I asked.

'My former customers are buying the other guy's products because they're cheaper,' he replied.

I asked him why he didn't give his old customers a sales talk on his products. Joe didn't seem interested .

'I don't care if they want to buy from him, that's their privilege. If they don't want to be loyal, then I don't want to bother with them.'

'That's not the way to build business, Joe,' I told him. 'Why don't you step out and sell?' Joe still didn't seem interested. I tried another approach.

'Oh well,' I said, 'I suppose you can't blame them for wanting to save a penny on a popsicle condidering that they are all the same. Just ice water and sweetening.'

That did it. Joe went into action. 'They're by no means the same,' He exploded. 'My popsicles are double-barreled popsicles. In the first place they're larger than his; two for the price of one. You can break them in two easily and divide them among the kids. And their flavor is better because we use a higher percentage of pure fruit flavor.'

I looked astonished. Then I said, 'Joe, that's the finest sales talk I've heard in a long time. Why don't you tell your old customers what you just told me? Why, I'll wager you could win almost half of them back.'

Joe seemed a little astonished himself. About a month later, I noticed that the rival truck was no longer calling in the neighborhood, but Joe was there doing business in a bigger way than ever before."

You see, Joe remembered some facts about his product.

MOST CUSTOMERS WHO BUY A CHEAP PRODUCT BUY BECAUSE THEY DON'T REALIZE THAT THEY COULD GET MORE VALUE FOR THEIR MONEY THROUGH A SLIGHTLY MORE EXPENSIVE ARTICLE.

We must admit that there are some who cannot afford to pay more, but the majority of buyers are ignorant of the true value of the product. This is where your knowledge of the product is important, MOST OF THESE PEOPLE WILL WANT THE BETTER PRODUCT IF ITS MERITS AND FINE QUALITY ARE POINTED OUT IN AN EFFECTIVE WAY.

UNIT VI - PRODUCT KNOWLEDGE

Part 2 - Type of Product Knowledge Needed

Length: Open

Prerequisite: A background in the importance of product knowledge.

Description: To teach what the salesman must know about merchandise or service in order to sell successfully.

Objectives: Upon completion of this lesson the student will be able to:

1. List, from memory, the ten major points and explain what is meant by each with 100% accuracy.
2. Have a merchandise information check list that can be used on the job.

Sources:

Salesmanship Fundamentals, Ernest-DaVall, 1965, page 147-154.
Fundamentals of Selling, Wingate-Nolan, 1964, page 89-95.
Store Salesmanship, Robinson, Blackler, Logan, 1966, page 166-168.
Retailing, Richert, Meyer, Haines, 1968, page 129-133.
D.E. Basic Instruction Series (Advanced Selling), University of Texas, page 93-96.

OUTLINE

I. Background
    A. History of product
    B. History of Manufacturer
    C. History of uses
    D. Rarity
    E. Prestige
II. Product uses
    A. Primary - secondary
    B. Advantages of each use
    C. Where, When and How used
    D. By Whom used
    E. Special or unusual uses
    F. Relationship of its uses to other items
III. Composition
    A. Types of materials
    B. Quality of materials
    C. Cost of materials
    D. Points of superiority
IV. Appearance
    A. Color

- B. Style
- C. Design
- D. Finish
- E. Ensemble possibilities

V. Performance
- A. Durability
- B. Cost of maintenance
- C. Breaking strength

VI. Manufacturing Process
- A. Advantages
- B. Handmade or machine made
- C. Packaging

VII. Care of Product
- A. Cleaning
- B. Storage
- C. Repair
- D. Inspection (quality control)

VIII. Price and Terms of Sale

IX. Compared to Competition
- A. Superiority
- B. Features
- C. Reputation

X. Services
- A. Credit terms
- B. Delivery
- C. Guarantees
  1. Quality
  2. Specification
  3. Performance

ACTIVITIES

1. List ten major points on board, leaving space beneath each. With class; develop subpoints under each major point.
2. Look over and discuss the "Merchandise Information Check List." (refer to enclosed Activity 2)

UNIT VI - PRODUCT KNOWLEDGE
Part 2 - Type of Product Knowledge Needed
Activity 2

Merchandise Information Check List

In addition to a knowledge of sources of information on merchandise, the student should have a simple check list of desirable information that is applicable to almost all types of products. Such a check list appears below. It may be duplicated and handed in quantity to each student, or reproduced on the chalk board for student copying. A knowledge of just half of the check list will provide the student with at least a skeleton of merchandise information.

A. Of what material is it made?

B. How is it made?

C. What are its style features?

D. What are its uses?

E. How should it be cared for?

F. In what sizes does it come?

G. In what colors does it come?

H. What are the price ranges?

I. What is the most popular price?

J. What information is there on the label?

UNIT VI - PRODUCT KNOWLEDGE
Part 3 - Acquiring Product Knowledge

Length: Open

Prerequisite: A background of what knowledge the salesman should have about his product.

Description: A study on the ways and means of securing knowledge of merchandise or service.

Objectives: Upon completion of this lesson the student will be able to:
1. Acquire product knowledge and demonstrate this knowledge by writing a merchandise manual.
2. List ten sources of product knowledge, 5 internal and 5 external sources.

Sources:
Salesmanship Fundamentals, Ernest-DaVall, 1965, page 147-154.
Fundamentals of Selling, Wingate-Nolan, 1964, page 95-102.
Store Salesmanship, Robinson, Blackler, Logan, 1966, page 162-172.
Retailing, Richert, Meyer, Haines, 1968, page 133-138.
D.E. Basic Instruction Series (Advanced Selling), University of Texas, page 96-98.

OUTLINE

- I. Internal sources
  - A. Store library
  - B. Department manuals
  - C. Labels and tags
  - D. Store buyer
  - E. Customers
  - F. Store's testing bureau
  - G. Salesperson's own experience
  - H. Department and division managers
  - I. Manfacturer's sales representatives
  - J. Store sales meetings
  - K. Mail order catalogs
- II. External sources
  - A. Books and current periodicals
  - B. Public library
    - 1. Pamphlet file
    - 2. Books of the subject
    - 3. Reference books
    - 4. Under subject heading

        - a. Card catalog
        - b. Reader's guide
        - c. Periodical guide
- C. Manufacturer
    - 1. Letters directly to the firm
    - 2. Advertising materials
    - 3. Yellow pages
- D. Competitors' local advertising
- E. Store's own advertising
- F. National brands advertising
- G. Government pamphlets
- H. Friends, neighbors and acquaintances
- I. Personal interviews
    - 1. Officials of organizations handling merchandise
    - 2. Specialists
- J. Trade and technical magazines
- K. Radio and television
- L. Evening school courses and other training programs
- M. How-to publications
- N. Merchandise manuals
- O. Comparison shopping

ACTIVITIES

1. Select a product and have the students bring ads to class.
2. Have each student select a product, then have them complete a comparison survey on that product in your local business community.
3. Have each student develop a product manual.(refer to enclosed activities).
4. Have students write to manufacturer inquiring about product information.

UNIT VI - PRODUCT KNOWLEDGE
Part 3 - Acquiring Product Knowledge
Activity 3 - Product Manual

In developing your merchandise manual, assume that it will be used by a new salesperson who is unfamiliar with the article. That person should be able to find anything necessary for selling the article that is the subject of the manual. It is obvious that some of the points in the outline may not fit the article you have chosen. Use all of the points that do pertain to it.

1. Cover
   a. Title should be indicative of article
   b. Cover should create immediate interest

2. Introduction
   a. Purpose of manual
   b. Importance of merchandise knowledge from viewpoint of:
      (1) Customer
      (2) Salesperson
      (3) Store

3. What your customer wants to know
   a. What the article is
   b. Who uses it
   c. Purpose for which it is used
   d. How it is used
   e. What it will do for the user
   f. Outstanding features
   g. Colors, sizes and styles available
   h. How it can be used in combination with other goods

4. Qualities for which the customer is looking in the article:
   a. Beauty
   b. Color
   c. Cut and fit
   d. Comfort
   e. Durability
   f. Design
   g. Easy to care for
   h. Fabric
   i. Fastness of color
   j. Finish
   k. Quality
   l. Serviceability
   m. Strength
   n. Style
   o. Workmanship

5. Now to recognize such factors as:
   a. Strength
   b. Durability
   c. Quality
   d. Fastness of color, etc.

6. Steps in selling the article:
   a. Preapproach
   b. Approach
   c. Presentation
   d. Meeting objections and answering questions
   e. Securing conviction
   f. Closing the sale
   g. Suggestion selling

7. Learning your article's language
   a. Pronunciation of new or foreign words
   b. Descriptive adjectives and terms
   c. Glossary

UNIT VI - PRODUCT KNOWLEDGE

Part 4 - Developing Product Knowledge Into Selling Points

Length: Open

Prerequisite: A background of product knowledge types and how to acquire them.

Description: To teach the student to develop product knowledge into selling points.

Objectives: Upon completion of this lesson the student will be able:

1. Write a product analysis sheet.
2. When given some product knowledge, to turn it into selling point.

Sources:

Salesmanship Fundamentals, Ernest-DaVall, 1965, page 156-162.
Store Salesmanship, Robinson, Blackler, Logan, 1966, page 172-177.
Retailing, Richert, Meyer, Haines, 1968, page 202-204.
D.E. Basic Instruction Series (Advanced Selling), University of Texas, page 98-99.

OUTLINE

- I. Merchandise Approach
  - A. Start the customer thinking about the article
  - B. Approach the customer looking at merchandise and make an interesting statement about it.
- II. Relating to the customer's needs
  - A. Discover the customer's needs
  - B. Correlate merchandise information to customer's needs
  - C. Bring out the strongest selling points early in the sale.
  - D. Plan your product knowledge so that you can make forceful selling statements at appropriate times.
- III. Product Analysis Sheet
  - A. Turn product fact into a selling point
  - B. Example

PRODUCT: Screwdriver

Product Fact	Selling Point
1. Hammer-forged	1. The bit will not slip easily from the screw slot.
2. Made of selected tool steel	2. The blade is remarkably tough. Will withstand all kinds of rough usage.
3. Blade is hardened and tempered its entire length.	3. This means that the bit will not twist or chip on heavy work.

Product Fact	Selling Point
4. Blade runs through length of handle.	4. The handle is everlastingly locked. The blade is locked securely in the handle.
5. Handle is shockproof.	5. Will withstand up to 10,000 volts of electricity. It is safe.
6. Has plastic "snug-fit" handle.	6. Handle is long-wearing. It is also comfortable.

- IV. Sales Demonstration
  - A. Must know merchandise in order to demonstrate it.
  - B. Stress key selling features as product is demonstrated.
- V. Sell Quality and Use Rather Than Price
  - A. Customer wants most for his money
  - B. Sell the use value
- VI. Answer Objections With Product Knowledge
  (Refer to unit on Salesmanship)
- VII. Reducing Merchandise Returns
  - A. Sell the merchandise, not the guarantee.
  - B. Find out what the customer needs and sell the right merchandise for the right purpose to the right person.
  - C. Never make claims that cannot be backed up with fact.
- VIII. Summary of Product Knowledge As a Sales Tool
  - A. Product knowledge cannot exist separate from the techniques of selling.
  - B. There is a right way and a wrong way to use merchandise facts.
    1. Facts must be put into the language of the customer.
    2. Facts should be stated in a positive and forceful manner.
    3. The strongest facts should be presented first.
    4. Facts should be backed up by demonstration of the product.
    5. Facts should not be used to show off your superior knowledge.
    6. Facts should not be used to start or carry on an argument; they should be used to persuade.
    7. Facts should be used only where they answer questions in the customer's mind or start the customer thinking about the value of the product.
    8. Facts should be related to customer's needs.

ACTIVITIES

1. Have the student pick a product and develop a product analysis sheet.

UNIT VII

COMMUNICATIONS

Part 1 Written Communications-----Letters, Interoffice Memo
2 Oral Communications-----Use Of The Telephone
3 Oral Communications-----Public Speaking
4 Printed Communications-----Daily Newspaper
5 Listening

UNIT VII - COMMUNICATIONS
Part 1 - Written Communications

Length: Open

Prerequisite: A general knowledge of the block and modified block style letter, open and mixed punctuation.

Description: A study in writing business letters and interoffice memorandum.

Objectives: At the completion of this unit the student will be able to do the following:

1. The student will be able to compose and write an application letter using the correct form and punctuation.
2. The student will be able to identify the block and modified block style letter and compare the major differences between the two letters.
3. The student will be able to list the five C's of effective written communications.
4. The student will be able to identify the form of an interoffice memorandum.

Sources:

Communication in Marketing, Rowe-Jimerson, 1971, page 95,102,109,116.
Retail Merchandising, 7th Ed., Wingate-Samson, page 588.
Fundamentals Of Selling, 9th Ed., Wingate-Nolan, page 460, 468.
Communications in Distribution, First year manual, University of Texas, page 59, 80.
Refer to Current Business English Book.
Refer to Current typing text.

OUTLINE

I. Business Letters
    A. Job Application letter. (Also see Job Placement Unit)
    B. Sales Letter
    C. Collection Letter
    D. Letter requesting information
II. Organization Of Business Letters
    A. Date
    B. Address
    C. Salutation
    D. Body of the letter
    E. Complimentary close
    F. Signature
    G. Enclosure

- III. The Five C's Of Effective Writing
  - A. Courtesy
  - B. Correctness
  - C. Clearness
  - D. Conciseness
  - E. Completeness
- IV. Letter Styles
  - A. Modified block style
  - B. Block style
  - C. Open punctuation
  - D. Mixed punctuation

(use overhead projector to demonstrate these styles.)

- V. InterOffice Memorandum
  - A. To:
  - B. From:
  - C. Subject
  - D. Date
  - E. Short informal report within a company
  - F. Concerns company policy and procedure
  - G. Usually considered confidential
  - H. Saves time for the writer and reader.

ACTIVITIES

1. Show your understanding of business letters by composing and writing an application letter. (Instructor will supply the help wanted ad from the classified section of their daily newspaper.)
2. Assign students to bring to class, three letters they have received in the mail recently. Assign students to orally point out the organization structure and the style of several letters.
3. Analyze a business letter you have received using the five C's formula.
4. Bring several Interoffice Memorandums to class and analyze according to the five C's formula. (Instructor may have to supply)
5. Providing students with an Interoffice Memo form; allow students to compose an Interoffice Memo for their training station.
6. Analyze and re-write the following two letters using the five C's formula. (Instructor will provide letters to re-write) Attached.
7. Analyze and re-write a follow-up letter. (Attached)
8. Students will select an item from an advertisement that they would like to buy. He would write a concise, specific letter to the store or manufacturer to order the product. (Attached)
9. Many follow-up letters could be used for this exercise. For example, the student would write another letter to inform the store that the merchandise did not arrive, that it arrived damaged or that the wrong lot number was received.
10. Select three business letters that you have received recently, eliminate all capitalization and punctuation and have enough of each duplicated for each member of the class. Students should insert capitalization and proper punctuation and be ready to justify each capital letter and punctuation mark.

11. Gobbledygook game -- Shows necessity for clarity in written communication and proves to be a fun activity for the classroom. (Attached)
12. The Writer's Checklist - Handout.

UNIT VII - COMMUNICATIONS
Part 1 - Written Communications
Activity 5 - Sample Sales Letter

You purchased a washing machine from Albemarle Appliance Store. After you had used it 4 or 5 times, it broke down and required adjustment. A bill was sent to you for $7.50. You wrote to the store and received this reply: (25 points)

Dear Mr. Sinclair:

We are sorry that we cannot cancel the $7.50 charge for adjusting your Rex Washin Machine.

We have to pay our repairmen high salaries, and we must account for every call they make. Since the adjustment necessary was probably due to your over-loading your washer, we feel that it was your fault, not ours. Therefore, why should we suffer the loss.

Yours very truly,

1. How would you feel if you received this letter?

2. What is wrong with this letter - compare it with the 5 C's Formula.

3. Rewrite the letter so that it would have the "tone" you think it should have. An adjustment can be made if you feel it is necessary.

UNIT VII - COMMUNICATIONS
Part 1 - Written Communications
Activity 6 - Sample Collection Letter

You are to criticize the following letter on the basis of the qualities that were discussed in the lectures and in the "5 C Formula". For each criticism you state, suggest an alternative.

Dear Mrs. Barker:

We do not believe you have any cause for complaint concerning the shipment of your order for Princess Priscilla Blouses. Our seamstresses have been working night and day trying to catch up on a multitude of orders. It is not our fault that the blouses you ordered have been so popular that everyone wants them. Besides, you should have ordered them earlier. We are just not prepared to handle that big run on our stock. One of the problems was that at first the textile mills were not sending us enough of the yard goods from which the blouses are made. So, they were behind; but they have caught up now. If you will just be patient, we will do our best to get your order shipped. You ask whether you can have these blouses in time for Easter. That is a good question. It looks like we could and I am sure you will, but still one never knows, do they? As a matter of fact, our production manager said this morning that we will ship all orders by the end of next week. This means you would be receiving them two weeks before Easter.

Yours truly,

UNIT VII - COMMUNICATIONS
Part 1 - Written Communications
Activity 7 - Follow Up Letter

95% of all applicants never write a follow-up letter, and the 5% that do stand a better chance of being seriously considered for the job.

How might we improve this letter:?

January 30, 197_

Mr. Henry Crank
33314 Wake Street
Seattle, Washington 90123

Dear Mr. Crank:

It was real great of you to talk with me.

The position of Assistant Buyer is just the kind of experience that I am looking for. One of my strong points is good health and attendance and if I am employed I believe that discount merchandising presents a real challenge in today's retail field and I would like very much to be a part of it.

Please consider my application very serioulу and contact me when you have reached a decision.

Cordially yours,

____
(your name)

UNIT VII - COMMUNICATIONS
Part 1 - Written Communications
Activity 8 - Modified Block Style Sample

September 14, 197_ (elite 50 SP)
(pica 42 SP)

(6 to 10 SP)

Metropolitan Shoe Company
2307 South Archer Avenue
Chicago, Illinois 12431

Dear Sir:

As a student in Distributive Education at Rogers High School, Puyallup, Washington, I am required to make a merchandise manual on a specific product. I have chosen to do my manual on shoes. In this manual I am required to write on the history, style, manufacturing process, and uses. Illustrations and samples are included.

I will appreciate any information you could send to me on shoes-pictures, statistics, samples of leather, illustrations and folders.

Your prompt attention will be greatly appreciated as this manual is due in February. Thank you, for any help that you may give me.

Enclosed, please find a stamped, self-addressed envelope.

Sincerely yours,

Mike Smith

MS

enclosure

UNIT VII - COMMUNICATIONS
Part 1 - Written Communications
Activity 8 - Block Style Sample

September 14, 197_

(6 to 10 SP)

International Silversmith Inc.
11 West Overland Drive
Long Island City, New York

Gentlemen:

Students of Rogers High School, Puyallup, Washington, are compiling merchandise or area of distribution manuals. Each student writes on the subject of his choice. This is a merchandising research project.

In order to pursue the subject of "Plated Silver", it will be necessary for me to do a history of silver plating as a profession; to briefly discuss companies, such as yours, that have contributed in large measure to the industry as a whole.

It would be appreciated if you could send me a history of your operation. Any materials you have available covering the historic highlights of silver plating would be of value.

Enclosed, please find a stamped, self-addressed envelope. Thank you for your consideration.

Yours truly,

Richard Nixon

RN

enclosure

UNIT VII - COMMUNICATIONS
Part 1 - Written Communications
Activity 11 - Gobbeldygook

Ungobble the following gobbledygook:

1. Vermilion-hued cumulus formations observed during matinal hours cause considerable agitation to mariners, while the appearance of a visible garnet mass of vapor during nocturnal periods produced euphoria among those who traverse aqueous bodies.

2. All substances which exhibit a reflection of light particles emanating in dazzling profusion are not necessarily composed of a dense, metallic, chemical element which possesses a high degree of ductility and malleability.

3. A pair offers possibility of companionship, while tripleidenties considered as an aggregate assume the overpowering characteristics of a multitude.

4. Lavation is in proximity to a state of piety.

5. A warm-blooded, plumed vertebrate which activates its energies quickly from a state of nocturnal hibernation as able to seize by force or strategen the slender, soft bodied, segmented animal which lives by burrowing underground.

6. An overabundance of culinary experts often vitiates the bouillon.

7. The art of combining vocal or instrumental sounds or tones in varying melody, harmony, rhythm, and timbre in order to form structurally complete, expressive compositions mollifies the uncultivated primitive.

8. Individuals who inhabit domiciles composed of intangible substances containing silicon compounds should be wary of casting hard, non-metallic mineral metter.

9. Undue velocity produces lavish prodigality.

10. It is not considered prudent to enumerate an individual's stock of domestic fowl in advance of the termination of the period of gestation.

11. It is not judicious for an individual to engage in lachrymation concerning an unintentional overflow of lacteous substances.

12. A non-metallic mineral substance of definite density which is in the process of periodical revolution in orbit does not assemble quantities of lichenous material.

13. A group of three musculi, afflicted with the distressing malady of being unable to perceive with their ocular argans, has been observed to demonstrate unusual powers of locomotion and extreme agility. This triumvirate pursued the spouse of an agrarian developer, who severed their rear anatomy with a carving utensil; and it has been observed by onlookers that a spectacle of this particular rarity exceeded any experience they had ever encountered by it's sheer singularity.

GOOD LUCK!!

UNIT VII - COMMUNICATIONS
Part 1 - Written Communications
Activity 11 - Answers

1. Red skies in the morning, a sailors warning, red skies at night, a sailors delight.
2. All that glitters is not gold.
3. Two's company, three's a crowd.
4. Cleanliness is next to Godliness.
5. The early bird catches the worm.
6. Too many cooks spoil the stew.
7. Music sooths the savage beast.
8. People who live in glass houses shouldn't throw stones.
9. Haste makes waste.
10. Don't count your chickens before they hatch.
11. Don't cry over spilled milk.
12. Rolling stones gather no moss.
13. Story of 3 blind mice.

UNIT VII - COMMUNICATIONS
Part 1 - Written Communications
Activity 12 - The Writer's Checklist

Complete
- Does it give all the necessary information?
- Does it answer all the reader's questions?

Concise
- Does it contain any unnecessary information?
- Does it include only essential words, phrases, and sentences?

Clear
- Does the language fit the readers; are the words the simplest that can be used - clear and concise?
- Do the words exactly express the thought?
- Are the sentences clear?
- Does each paragraph contain only one main idea?
- Is the information presented in the best order?

Correct
- Is the information accurate?
- Do the statements conform with company policy?
- Is the writing free from errors in grammar, spelling, and punctuation?

Appropriate In Tone (Courtesy)
- Will the tone bring the desired reader reaction - appeal to his point of view?
- Is the writing free from words that may antagonize the reader-courteous, friendly, and sincere?
- Is it free from stilted, hackneyed, or legalistic phrases?
- Does it create a favorable first impression?
- Will it promote good will?

HOW TO WRITE MORE IN LESS TIME

1. Do your research first - find out all you can before you start to write.

2. Make an outline - what you want to say, how you want to say it, and why it is important to your readers.

3. Know your audience - ask yourself what information will be helpful to your reader and how you can present it to attract his interest.

4. Use simple, straightforward style - write to express rather than to impress.

5. Check over what you have written - does it meet the above requirements - does it sound smooth when read aloud - does each idea follow logically after the one before it.

"WRITE"UNTO OTHERS AS YOU WOULD HAVE THEM "WRITE" UNTO YOU.

UNIT VII - COMMUNICATIONS
Part 2 - Oral Communications - Telephone

Length: Open

Prerequisite: A general knowledge of how to use the telephone and the Tele-Trainer.

Description: A study of the proper use and selling by telephone.

Objectives: At the completion of this unit the student will be able to do the following:

1. The student will be able to list the five types of customers encountered in a telephone selling situation and solutions for handling each.
2. The student will be able to demonstrate the proper techniques of answering and speaking on the telephone.

Sources:
Fundamentals Of Selling, 9th Ed., Wingate-Nolan, page 405-416.
Retail Merchandising, 7th Ed., Wingate-Samson, page 363-367.
Telephone Sales, Retail Basic Training, Sears & Roebuck
Bell Telephone Company, pamphlets
  Selling by Telephone
  Practice Calls
  How the Telephone can Ring Up More Sales
  Types of Customers You May Talk To Over the Telephone
  Proper Methods of Using the Telephone

OUTLINE

I. Five Types of Customers Encountered In a Telephone Selling Situation
   A. Talkative
   B. Silent
   C. Hurried (Know solutions for handling each).
   D. Undecided
   E. Positive
II. Proper Method of Using the Telephone
   A. Answering
   B. Waiting on the line.
   C. Language -- Voice with a smile
   D. Handling Complaints
   E. Telling a customer no.
   G. Closing
III. Use of the Tele-Trainer
   A. Demonstrate
   B. Practice telephone calls on Tele-Trainer using proper methods for evaluation.

C. Using your training station, prepare three situations that could be encountered regarding the following:
   1. Complaint -- customer angry over materials sent.
   2. Collection -- You are the business calling the customer.
   3. General Information -- Customer

ACTIVITIES

1. Movies: Bell Telephone Company
   "In a Manner of Speaking"
   "If an Elephant Answers"
   "Tele-A-Trainer"

2. Students will play the roles of their training station manager and the customer in several role playing situations created by the teacher. (Example attached).

3. Discussion as to why customers shop by telephone.

4. Discussion as to the future of the telephone for business purposes.

UNIT VII - COMMUNICATIONS
Part 2 - Oral Communications - Telephone
Activity 3

Telephone Situations

You are to prepare a telephone sale presentation on each of the following situations. You are to prepare a list of objections that you would use if you were the customer on each of the following situations.

The owner of a radio supply house, Mr. Ellsworth, telephones Mrs. King, who recently purchased a stereophonic record player from him. Mr. Ellsworth wants to know whether Mrs. King is receiving satisfaction from the stereo, but at the same time he wants to interest her in a tape recorder (the stereo she purchased has space for a tape recorder, and the hookup would be very simple.)

Miss Crable is a salesperson in a retail fur salon, Broadbank Furriers. She receives a telephone call from a housewife, Mrs. Fillmore, inquiring about prices of mink stoles. Miss Crable tries to interest Mrs. Fillmore in coming to the store and seeing the furs. If this fails, she plans to try to arrange an appointment for an outside saleswoman to visit the prospect's home to display a selection of furs.

Clyde Jackson needs two new tires for his automobile. He telephones several tire dealers for prices. Fred Levine, a young attendant at Moser's Service Station, receives a call from Mr. Jackson and learns that he is attempting to make a buying decision on price alone. Fred believes that the line of tires he carries, while a little more expensive than most of the competing brands, is the best buy for the money. He attempts to convince Mr. Jackson that he should come to the service station and see the tires for himself.

UNIT VII - COMMUNICATIONS

Part 2 - Oral Communications - Telephone

Activity 3 - Proper Methods of Using the Telephone

Answering

1. Answer promptly
2. Identify yourself - name, company, department
3. Speak clearly in a well modulated voice.
4. Be sure to have paper and pencil handy for notes.

Waiting on Line

1. If have a hold button use it.
2. If not, cover both the mouth and ear piece.
3. Excuse yourself from the line and explain why - be sure to ask the customer if he minds waiting.
4. Do not keep waiting too long.
5. Thank them for waiting.
6. If have name or if able to obtain name from records, use it.

Language

1. Voice with a smile
2. Voice is you -- watch how you express yourself.
3. Do not use technical or slang words or phrases -- make customer feel foolish or ignorant.
4. Type of person talking to - housewife or lawyer.
5. Be sincere - tune in with customer,

Handling Complaints

1. Apologize even if customer is at fault.
2. Do not criticize other group or departments involoved.
3. Arrange investigation
4. You may not be able to completely satisfy customer but you have given him the opportunity to "air" his grievance.

Telling A Customer No

1. Tell why and suggest alternatives.
2. Credit problems - do not embarrass.
3. Recognize unusual circumstances.

Closing

1. Thank them for calling no matter what the circumstances.
2. Let them hang up first.
3. If customer waits for you to hang up first, do it gently.

UNIT VII - COMMUNICATIONS
Part 2 - Oral Communications - Telephone
Activity 3 - General Information

Be a good listener.

Do not make the customer feel hurried.

Express interest in person's point of view.

Display interest in what is said.

Let the other person tell his story completly without interruption.

TREAT THE CUSTOMER AS YOU WOULD WANT TO BE TREATED - DO UNTO OTHERS AS YOU WOULD HAVE OTHERS DO UNTO YOU.

UNIT VII - COMMUNICATIONS
Part 3 - Oral Communications - Public Speaking

Length: Open

Prerequisite: Class discussion on the organization and knowledge required for giving a public speech.

Description: A study in preparing and delivering a public speech.

Objectives: At the completion of this unit the student will be able to do the following:
1. Students will be able to develop and present speeches that entertain, inform and persuade.
2. The students will be able to identify and list the mechanics and organizational procedures for effective public speaking.

Sources:
A First Look at Distribution, State of Washington, 1966, page 89-97.
Communications in Marketing, Rowe & Jimerson, 1971, page 77-94.
Communications in Distribution, D.E., Basic Instruction Series, 1st year, University of Texas, page 30-58.
Fundamentals Of Selling, Wingate-Nolan, 9th Ed., page 151-174.
Washington DECA Handbook, Speakers Bureau, page 401-427.
Washington DECA Handbook, Public Speaking, page 101-103.

OUTLINE

I. Public Speaking Organization
  A. Opening remarks
  B. Introduction of your topic
  C. Organization of message (body)
  D. Knowing when, where and how to conclude.
II. Practicing the Speech
  A. Memorize ideas, not words
  B. Adjust tone, tempo and gestures to the audience.
  C. Prepare visual aids such as examples and illustrations.
III. Delivering the Speech
  A. Appearance
  B. Volume and enunciation
  C. Empathy--Transfer speaker's idea to the audience.

ACTIVITIES

1. Have each student select a subject from Business speaking contest topics, prepare an outline and present a speech to the class.

(Topics attached) Tape record and play back. Have students evaluate each speech by using a check list.

2. Have students develop and present the three types of speeches; informative, entertaining, and persuasive.
3. Read and classify editorials in your daily newspaper as to purposes such as: to inform to entertain, to persuade.
4. Use examples of "do it now" speeches, "impromptu" speeches, and pubilc speaking on pages 101-103 of the Washington DECA handbook.
5. Show the movie "Meanings are in People" from the University of Washington Audio Visual Commication Center. Emphasizing person to person communications.

UNIT VII - COMMUNICATIONS

Part 3 - Oral Communications - Public Speaking

Activity 1 - Suggested Topics For Business Speaking

1. My Ideas About a Salesman's Personality
2. Initiative -- A Stepping Stone to Promotions
3. How To Build a Customer Clienteles.
4. Is the Customer Always Right?
5. How Advertising Helps the Salesman
6. What "Private Enterprise" Means to Me
7. Distribution -- Key to Prosperity
8. Why is the Suberban Shopping Center of Great Importance Today?
9. Discuss the Qualities Needed by a Manager of a Large Department Store.
10. What are some advantages and disadvantages of the Charge Account In Comparison to Paying Cash?
11. Discuss Some of the Advantages and Disadvantages of Using a Checking Account in Comparison with Cash and Money Orders
12. The Benefits and Results from Newspaper Advertising are well known. Yet Some of the Cooperating Businesses in Our Area do not take Advantage of this Advertising Media. Can You Justify Their Actions and are There Other Advertising Media that They may be using?

SPEECH SCORE SHEET

(For all Speech Contests)

NAME of Contestant____

Representing__________________________Club, City of__________________________

Length of Presentation__________Minutes,________________Seconds__________________

Directions:
1. Fill out a separate sheet for each contestant.
2. Please circle one (1) number behind each point listed.
3. Total the points that have been circled and record opposite "Gross Points."

	Very Good	Good	Average	Fair	Poor
1. Opening--(Appearance, introduction)	5	4	3	2	1
2. Voice--(Pitch, tempo, vol. & enthusiasm)	5	4	3	2	1
3. Platform Deportment--(Gestures, poise, eye-contact, mannerism)	10	8	6	4	2
4. Organization--(Logic, clarity, suitability, coherence)	20	16	12	8	4
5. Mechanics--(Diction, grammar, pronunciation, word picture)	10	8	6	4	2
6. Close--(Summary, conclusion)	5	4	3	2	1
7. Content--(Facts, value of ideas, validity of ideas)	25	21	17	12	9
8. Delivery--(Naturalness, effectiveness, emphasis)	20	16	12	8	4

Gross Points______

JUDGES COMMENTS:

Less Penalty Points________

NET POINTS_______

UNIT VII - COMMUNICATIONS

Part 4 - Printed Communications

Length: Open

Prerequisite: A general knowledge of how the daily newspaper can be an effective tool in understanding the many areas of Distributive Education.

Description: To familiarize students with various forms of news stories in the daily newspaper and relate their findings to writing articles for the DECA Chapter.

Objectives: At the completion of this unit, the student will be able to do the following:

1. Students will be able to identify the constructive parts of a news story.
2. Students will be able to compose and write a news article for their DECA Chapter.

Sources: The Newspaper As A Teaching Device, obtained from Ohio Distributive Education, Bowling Green State University, 1967, page 6-9.
Communication in Distribution, Basic Series, 1st year, University of Texas, 1965, page 78-80.
The Living Textbook, (Part of a Newspaper in the classroom kit) Compliments of the Seattle Post Intelligencer.

OUTLINE

I. Lead - First Sentence of a News Story
   - A. Summary Lead - Lead sentence contains answers to the following questions:
     1. Who
     2. What
     3. When
     4. Where
     5. Why
   - B. Feature Lead
     1. Suggests suspence, human interest
     2. Plays on emotion
     3. Emphasizes entertainment rather than informative
     4. Catches and holds readers interest.

ACTIVITIES

1. Newspapers can be used as an example of good business writing. Some of the points to have students observe are sentence length and structure, choice of words, use of examples and incidents for interest.

2. Have students write a news article on some special event in your chapter activities.

3. Bring news clippings to class and identify the 5 W's (Who, what, when, where, why) in each story. Identify the "lead."

4. Find pictures that might tell a good story, Using the 5 W's, write a printed news story emphasizing the picture. (Much fun to show and read aloud).

5. Nasa Exercise by Jay Hall, the University of Texas. "Decision by Consensus Game." A game to show the importance of cooperation in communications. (Directions attached)

6. Group Communication Game - "Directions for making a set of Squares" A game to show the importance of cooperation in communications. (Directions Attached)

7. "Who Should Survive" - A group project adapted from a project developed by Dr. Richard Bear, C.S.C. (Attached)

8. Group Perception Survey - A form to allow each person to analyze himself as a part of the group.

UNIT VII - COMMUNICATIONS
Part 4 - Printed Communications
Activity 5

NASA EXERCISE

by

Jay Hall, The University of Texas

DECISION BY CONSENSUS

INSTRUCTIONS: This is an exercise in group decision making. Your group is to employ the method of Group Consensus in reaching its decisions. This means that the prediction for each of the 15 survival items must be agreed upon by each group member before it becomes a part of the group decision.

Consensus is difficult to reach. Therefore, not every ranking will meet with everyone's complete approval.

Try, as a group, to make each ranking one with which all group members can at least partially agree. Here are some guides to use in reaching consensus:

1. Avoid arguing for your own individual judgements. Approach the task on the basis of logic.

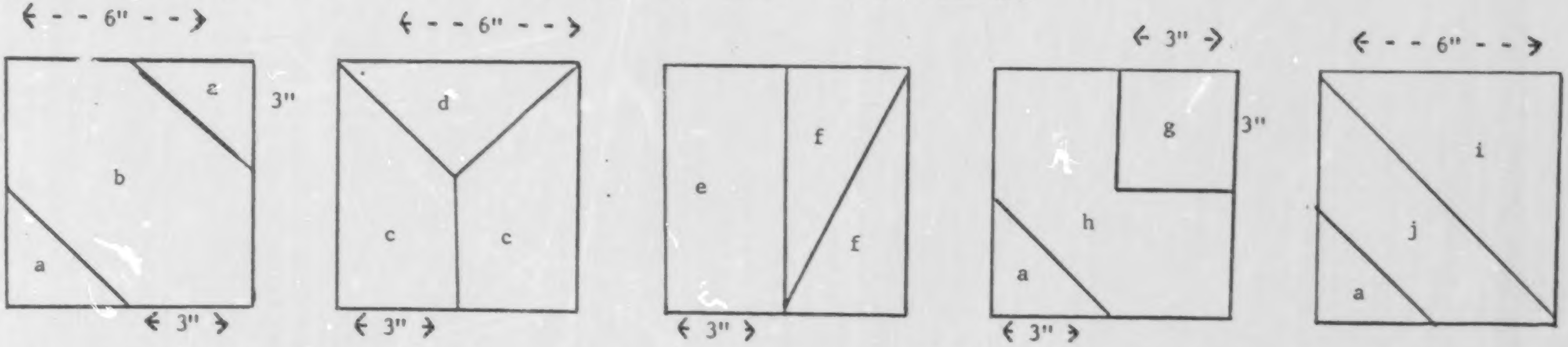
2. Avoid changing your mind only in order to reach agreement and avoid conflict. Support only solutions with which you are able to agree somewhat, at least.

3. Avoid "conflict-reducing" techniques such as majority vote, averaging, or trading in reaching decisions.

4. View differences of opinion as helpful rather than as a hindrance in decision-making.

On the Group Summary Sheet place the individual rankings made earlier by each group member. Take as much time as you need in reaching your group decision.

DIRECTIONS FOR MAKING A SET OF SQUARES



The lines should be so drawn that when cut out, all pieces marked a will be of exactly the same size, all pieces marked c of the same size, and so on. By using multiples of three inches, several combinations will be possible that will enable participants to form one or two squares, but only one combination is possible that will form five squares six by six inches.

After drawing the lines on the six-by-six-inch squares and labeling them with lower-case letters, cut each square as marked into smaller pieces to make the parts of the puzzle.

Mark each of five envelopes A, B, C, D, and E. Distribute the cardboard pieces in the five envelopes as follows:

Envelope A has pieces i, h, e
Envelope B has pieces a, a, a, c
Envelope C has pieces a, j.
Envelope D has pieces g, b, f, c

Erase the penciled letter from each piece and write, instead, the appropriate envelope letter, as Envelope A, Envelope B, and so on. This will make it easy to return the pieces to the proper envelope for subsequent use.

UNIT VII - COMMUNICATIONS
Part 4 - Printed Communications
Activity 5

NASA EXERCISE

by

Jay Hall, The University of Texas

DECISION FORM

INSTRUCTIONS: You are a space crew originally scheduled to rendezvous with a mother ship on the lighted surface of the moon. Due to mechanical difficulties, however, your ship was forced to land at a spot some 200 miles from the rendezvous point. During the landing, much of the equipment aboard was damaged and, since your survival depends on your reaching the mother ship, the most critical items available must be chosen for the 200 mile trip.

Below are listed the 15 items left intact and undamaged after landing. Your task is to rank-order them in terms of their importance in allowing your crew to reach the mother ship. Place the number 1 by the most important item, the number 2 by the second most important, and so on through number 15, the least important.

answers		
15	______	Box of matches
4	______	Food concentrate
6	______	50 feet of nylon rope
8	______	Parachute silk
13	______	Portable heating unit
11	______	Two .45 calibre pistols
1	______	One case dehydrate Pet Milk
3	______	Two 100 lb. tanks of oxygen
9	______	Steller map of the moon's constellation
14	______	Rubber life raft
2	______	Magnetic compass
10	______	Five gallons of water
7	______	Signal flares
5	______	First-aid kit containing injection needles
12	______	Solar-powered FM receiver-transmitter

UNIT VII - COMMUNICATIONS

Part 4 - Printed Communications

Activity 7

"Who Should Survive?" A group Project adapted from a project developed by Dr. Richard Bear, C.S.C.

The following 15 persons are in an atomic bomb shelter. An atomic attack has occured. These 15 persons are the only humans left alive on the earth. It will take two weeks for the external radiation level to drop to a safe survival level. The food and supplies in the shelter can sustain at a very minimum level, seven persons for two weeks. In brief, only seven persons can minimally survive. It is the task of your group to decide the seven persons who will survive. The group decision must be not only a consensus, but also must be unanimous.

1. Dr. Dane	39, white, Religion-no affiliation. PHD in History, College Prof., good health, Married-1 child (Bobby), Active and enjoys politics.
2. Mrs. Dane	38, white, Jew, AB and MA in Psych., Counselor in Mental Health Clinic, Good health, Married-1 child (Bobby), Active in community.
3. Bobby Dane	10, white, Jew, Special Ed. Classes for 4 years, mentally retarded I.Q.-10, Good health, enjoys his pets.
4. Mrs. Garcia	33, Spanish-American, Roman Catholic, 9th Grade Education, cocktail waitress, Prostitute, Good health, Married at 16, divorced at 18, Abandoned as a child, in foster home as a youth, attacked by foster father at age 12, ran away from home, returned to reformatory, stayed till 16, 1 child-3 weeks old (Jean).
5. Jean Garcia	3 weeks old, Spanish-American, Good health, Nursing for food.
6. Mrs. Evans	32, Negro, Protestant, AB and MA in Elementary Ed., Teacher, divorced, 1 child (Mary), Good health. Cited as outstanding teacher enjoys working with children.
7. Mary Evans	8, Negro, Protestant, 3rd grade, Good Health, Excellent student.
8. John Jacobs	15, white, Protestant, 8th grade, Good health, honor student, very active, broad interests, father is Baptist minister,
9. Mr. Newton	25, Negro, claims to be an atheist, starting last year of Med. school, suspended, homosexual activity, good health, seems bitter concerning racial problems, wears hippy clothes.
10. Mrs. Clark	28, Negro, Protestant, college grad, engineering, electronics eng. married, no children, good health enjoys outdoor sports and stereo equipment, grew up in ghetto.
11. Sister Mary	27, Nun, college grad, English major, grew up in upper middle class neighborhood, good health, father a businessman.

12. Mr. Blake	51, white, Morman, HS Grad, Mechanic, "Mr. Fix-it", Married, 4 children not with him, good health, enjoys outdoors and working in his shop.
13. Miss Farris	21, Spanish-American, Protestant college senior, nursing major, good health, enjoys outdoor sports, likes people.
14. Father Franz	37, white Catholic, college, plus seminary, priest, active in civil rights, criticized for liberal views, good health former athlete.
15. Dr. Gonzales	66, Spanish-American, Catholic, medical doctor, general practitioner, has had 2 heart attackes in past 5 years but continues to practice.

UNIT VII - COMMUNICATIONS
Part 4 - Printed Communications
Activity 8 - Group Perception Survey

This exercise may be used either after the "NASA exercise" or the "Who Should Survive Exercise."

Answer all questions on the basis of the most recent meeting of this group.

1. Would you have liked to talk more? YES______ NO______

1-A. Estimate how many in this group (counting yourself) marked NO to question 1.

2. Are you satisfied with the attention and consideration the group gave to your comments? YES_____ NO_____

2-A. Estimate how many in this group (counting yourself) marked YES to question 2.

3. During the most recent meeting, did you usually feel at home--like you really belonged in this group? YES_____ NO_____

3-A. Estimate how many in this group (counting yourself) marked YES to question 3.

4. Did you have strong negative feelings that you did not openly describe about anything that happened during the most recent meeting. YES_____ NO_____

4-A. Estimate how many in this group (counting yourself) marked NO to question 4.

5. If you had to miss a meeting of this group, would you be willing to let the group make decisions in your absence that would be binding on you when you returned? YES_____ NO_____

5-A. Estimate how many in this group (counting yourself) marked YES to question 5.

6. As a result of this meeting do you feel less inclined to participate next time? YES_____ NO_____

6-A. Estimate how many in this group (counting yourself) marked NO to question 6.

UNIT VII - COMMUNICATIONS
Part 5 - Listening

Length: Open

Prerequisite: A general knowledge of the importance of listening.

Description: A study in effective listening.

Objectives: At the completion of this unit, the student will be able to do the following:

1. The student will be able to identify the basic rules for listening.
2. The student will be able to define Passive and Active listening.
3. The student will be able to list the purposes for listening.

Sources:
Communications in Marketing, Rowe and Jimerson, 1971, page 15-25.
A First Look at Distribution, State of Washington August 1966.
Business Communications, Unit 10-1964 Course Outline.
You Can Improve your Communications - Listening, By W.E. Schaer, Obtained from Division of Vocational Education, Olympia, Washington, 1967.

OUTLINE

- I. Basic Rules of Listening
  - A. Prepare yourself to listen (concentrate)
  - B. Have an open mind--prejudice and bias
  - C. Listen carefully
  - D. Listen with empathy
- II. Purposes for Listening
  - A. To get information
  - B. For entertainment
  - C. To Evaluate ideas
  - D. To appreciate
- III. Passive and Active Listening
  - A. Passive listening is casual listening, paying only partial attention to what is being said.
  - B. Active listening is giving full attention to what is being said.

ACTIVITIES

1. Listen to a speech of at least 5 minute duration. Identify the main points being made by the speaker and identify words and phrases which cause you to react to the speaker and the speech.

2. The Listening Team Technique, Business Communications Unit, Washington Course Outline, 1964, page 31-32.

3. Have students listen to a speech, record or tape recording and answer specific questions relating to the presentation. (SMI has available tapes).
   a. The speaker's position as I see it
   b. Words, phrases, illustration that caught my attention
   c. General comments.

4. Communicator Exercise Game: Points out the importance of listening and the misinterpretation involved in communication. (Attached)

5. Communications Exercise Game: Example of person to person communication and listening. (Attached)

UNIT VII - COMMUNICATIONS
Part 5 - Listening Communications
Activity 4 - Communicator Exercise

Directions:

Communicator: Ask one person in the audience to act as the communicator. Instruct the volunteer that he is to give directions to the group in placing their rectangles on their workshop (8 1/2" X 11" cardboard sheet) so that their design of rectangles looks like the design of rectangles appearing on the transparency. The group is not to see the design on the transparency until after the exercise is over.

Note: After everyone has received their materials and you have given instructions to the communicator, give the following instructions to the group.

Group: Communicator gives the following instructions:

1. You should all have before you a worksheet and seven small rectangles.
2. The only communications which may take place in this exercise will be those given by me, the communicator; none of you, in the audience, will be allowed to speak during the exercise.
3. Our objective is that when I am finished giving instructions or directions, you should have the same design of rectangles on your worksheet that I have on my worksheet.

The Communicator then fits his rectangles to the rectangular boxes appearing on the transparency and gives instructions to the group or audience as he goes along. When the Communicator is finished, he turns on the overhead projector and shows the finished design to the audience. Communicator finds out how many ended up with the same design.

Learning Experience: Importance of two-way communication, a necessity for cooperation and importance of listening by a member versus looking for a feedback by the speaker.

Alternatives: Repeat the Communicator Exercise, but use a different rectangular design on the transparency. Also, in this case instruct the group that in this exercise the objective is to have 100% of the group end up with the same design. In this exercise there will be two-way communication and everyone can speak after they are recognized by the Communicator. However, only oral communication is to be allowed.

UNIT VII - COMMUNICATIONS
Part 5 - Listening Communications
Activity 4 - Communications Exercise = Person to Person

This exercise is similar to the Communicator Exercise except the exercise will involve one person, the communicator, giving directions to one other individual instead of a group of participants. Instead of using seven rectangles, the communicator will use various shaped figures. The materials needed for this exercise are as follows (two sets will be needed, one for communicator and one for listener):

1. An 8 1/2" X 11" piece of white paper to be used as the participant's "work sheet".
2. Two (2) equilateral triangles, one cut from blue paper and another cut from green paper.
3. One (1) rectangle cut from yellow paper.
4. One (1) square cut from red paper.
5. One (1) circle cut from blue paper.
6. Two (2) ellipses, one cut from green paper and the other cut from yellow paper.

From the chapter members, ask for volunteers for the position of "communicator" and the position of "listener". Have the participants sit at a table facing each other and by using textbooks, build a divider down the center of the table by stacking the texts on top of each other. No eye contact should be visible between the participants.

Next, give the "communicator" and "listener" a "worksheet" and a set of figures. Instruct the participants that it will be the job of the "communicator" to place the figures on his "worksheet" in any manner he chooses and that the objective of this exercise is for the"communicator" to instruct the "listener" so that both participants will have the same design on their "worksheet" at the end of the time limit set by the "communicator". The time limit should be 15 minutes. Also, neither participant may look at the worksheet or figures of the other participant. The "communicator" is the only one who is allowed to speak. The "listener" is not allowed to speak and must rely on verbal communication received from the "communicator" in duplicating the pattern on his "worksheet".

After the exercise is completed, have discussion using the following discussion questions:

1. How could the "communicator" improve his communications ability?
2. What did the exercise demonstrate?
3. How could the "listener" improve his performance?
4. Can you relate an actual experience you have had to this particular exercise?
5. What are the pitfalls of verbal communications?
6. What is the importance of feedback?
7. How does perception affect our communication skills?

8. Do you see any similarities between person to person communications and individual to group communications?
9. Is there any relationship between the leader-follower concept and the interaction of the communicator-listener?
10. How would you describe your own communications ability?

UNIT VIII

MATHEMATICS OF DISTRIBUTION

Part 1 Pretest and Review
2 Mathematics of Buying
3 Mathematics of Pricing
4 Mathematics of Selling
5 Mathematics of Management
6 Reporting Business Information
7 Everyday Measurements

Note To Instructor

The utilization of this unit would be facilitated easier with the purchase of Applied Business Mathematics, 8th Ed, by Piper & Gruber, South-Western publishing and Corresponding Workbook.

UNIT VIII - MATHEMATICS OF DISTRIBUTION
Part 1 - Pretest and Review

Length: Open

Prerequisite: Discussion on the ways mathematics is related to jobs in the field of distribution.

Description: An analysis of student's mathematical ability and a review and building of fundamental math skills.

Objectives: At the completion of this lesson the student will be able to do the following:

1. Realize his mathematical ability.
2. Pass employment math tests given or comparable to those given by most employers at least at a minimum level.

Sources:

Business Mathematics, Rosenberg and Lewis, 7th Ed., 1968, page 557-567.

Applied Business Mathematics, Piper and Gruber, 8th Ed., 1965, page 501-554.
Mathematics For Business Occupations, Huffman, 3rd Ed., 1968,
Participation Experience Project Ideas, D.E., CCOE, 1969, page 91-93.

OUTLINE

I. Pretest
   A. Sears, Penney's Grants, or other similar employment tests.
   B. Comparable pre-employment or math diagnostic test.
II. Review of BASIC MATHEMATICS
   A. Adding, subraction, multiplication, division.
   B. Percents, decimals, fractions.
III. Legibility in Numbers
   A. Neatness
   B. Readability
   C. Proper placement of signs (dollar, cents, decimals).

ACTIVITIES

1. For speed development and practice, list a column of numbers on board and have teacher or student point to various numbers and have class add in head. Point to any number conbination at any speed to build mental adding ability skill and speed.

2. Students go to local business and ask if they may take their pre-employment math test. Have the students report on their experience.
3. Have timed exercises in all the math areas to build speed in computation. Stress accuracy. Problems to be assigned by teacher.
4. Students may interview businessmen as to the role that math plays in their business and its importance.
5. To develop legibility in number writing have students drill on writing numbers by themselves, in columns, write checks, sales slips, entries in ruled journals. Also, stress penmanship.
6. Sample problems and tests available in Piper & Gruber Workbook, 8th Ed., Applied Business Mathematics, South-Western. Also available in Merchandise Mathematics, D.E. Series by Piper from South-Western.
7. Pretests available on page 91-93 in PEPI.

UNIT VIII - MATHEMATICS OF DISTRIBUTION

Part 2 - Mathematics Of Buying

Length:	Open
Prerequisite:	Lecture and discussion of the buying function.
Description:	A study of the mathematical concepts utilized in the buying process.

Objectives: At the completion of this lesson the student will be able to do the following:

1. Define stock turn, the open to buy amount, and model stock and their relationship to the buying situation.
2. Demonstrate his knowledge of the terms expressed on most invoices by listing and defining these terms and their relationship to each other.
3. Compute with 100% accuracy cash, trade, and series discounts on a given problem.
4. Compute with 100% accuracy the total expense of buying and getting the merchandise delivered on a given problem.

Sources:

Mathematics for Business Occupations, Huffman, 3rd Ed., 1968, page 393-400.

Fundamentals of Selling, Wingate-Nolan, 9th Ed, 1969, page 366-376.

Applied Business Mathematics, Piper and Gruber, 8th Ed., 1969, page 357-378.

Business Mathematics, Rosenberg and Lewis, 7th Ed., 1968, page 324-329.

OUTLINE

- I. Merchandise PLANNING
  - A. Stock turn
  - B. Open to buy amount
  - C. Model stock
- II. Purchasing Merchandise
  - A. Invoice
  - B. Terms of Sale
    - 1. Dating
    - 2. Shipment
  - C. Aliquot parts
- III. Discounts
  - A. Trade
  - B. Cash
  - C. Series
  - D. Cash Price

IV. Buying Expense
    A. Cash price
    B. Freight
    C. Other costs

ACTIVITIES

1. Each student bring an Invoice from his training station and explain terms discounts, dating, and total expenses.
2. Prepare a model stock plan for the school store and figure stock turn and plan and open to buy amount.
3. Take an item in the school store or training station and compute the total buying expense.
4. Use sales slips or invoices with multiple items and figure aliquot parts.
5. Sample problems available in Piper & Gruber Applied Mathematics Workbook, 8th Ed., South-Western, and Merchandise Mathematics, D.E. Series by Piper from South-Western.

UNIT VIII - MATHEMATICS OF DISTRIBUTION
Part 3 - Mathematics Of Pricing

Length:	Open
Prerequisite:	Units on pretest and review and Mathematics of Buying.
Description:	A study of the math involoved in the procedures for pricing merchandise.

Objectives: Upon completion of this lesson the student will be able to do the following:

1. Compute markup or markon on cost and retail price and determine the appropriate percentage of each with 100% accuracy.
2. Compute percentage of markdown and express in dollar amounts with 100% accuracy.
3. Demonstrate procedure for multiple pricing.
4. Given a simple code name and cost price determine code for a given article.

Sources:

Retail Merchandising, Wingate-Samson, 7th Ed., 1968, page 296-300.

Mathematics For Business Occupations, Huffman, 3rd Ed., 1968, page 400-407.

Business Mathematics, Rosenberg-Lewis, 7th Ed., 1968, page 340-351.

Applied Business Mathematics, Piper and Gruber, 8th Ed., 1965, page 377-412.

OUTLINE

I. Computing Markup Or Markon
   - A. On retail price
   - B. On Cost price
   - C. Finding rate of markup or markon

II. Markdown
   - A. As a percentage
   - B. As a dollar amount

III. Multiple Pricing

IV. Coding

ACTIVITIES

1. Use school store situation, if available, to give practical analysis of the pricing function.
2. Prepare codes for items in training station or in school store.

3. Take five items and figure markup on retail and markup on cost.

4. Discussion on what percentage of markup should there be on a a particular product and what are ramifications. High volume products vs. low volume products.

5. Obtain from local business a cardboard computer that computes markup, cost, cost per dozen, etc: And let students use them to become aquainted with this common pricing tool.

6. Problems available for practice in Piper & Gruber's Applied Mathematics Workbook, 8th Ed., South-Western, and Merchandise Mathematics, D.E. Series by Piper from South-Western.

UNIT VIII - MATHEMATICS OF DISTRIBUTION
Part 4 - Mathematics of Selling

Length: Open

Prerequisite: General knowledge of math and Merchandise Math units II and III.

Description: A study of the mathematics involved in selling merchandise.

Objectives: At the completion of this lesson the student will be able to do the following:

1. Correctly fill out a sales slip and compute tax on a given sale.
2. Demonstrate handling a sales return and ensuing computation or credit slip.
3. Demonstrate procedure in handling credit cards and related slips in credit card sales.
4. Figuring commission on sales and keeping tally sheet.

Sources: Mathematics for Business Occupations, 3rd Ed., Huffman, Twiss, & Whale, page 368-376.
Retail Merchandising, 7th Ed., Wingate-Samson, page 353-360.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 523-534, and page 232-238.

OUTLINE

- I. Sales Situation
    - A. Making sales slips
    - B. Handling refunds
    - C. Handling exchange
    - D. Handling credit cards
    - E. Sales Tax
- II. Cash Register Procedures
    - A. Refer to checker cashier unit
- III. Commission Selling
    - A. Figure percentages
    - B. Figure talley sheet
- IV. Computing discounts
    - A. Sale merchandise
    - B. Markdowns
    - C. Customer Discounts

ACTIVITIES

1. Bring a collection of sales slips, credit card applications, credit and return slips, and other items used in daily selling and fill each out in detail and legibly, and present to the instructor.

2. Work out a possible commission rate for yourself and have approved by employer as to percentage and pertinent factors and use a tally sheet for one week and figure your commission or cost of selling.

3. Pick 5 items in your store and mark each down 10, 15, 20, 25, 33, and 50 per cent.

4. Problems available in Applied Business Mathematics Workbook, Piper & Gruber, 8th Ed., and Merchandise Mathematics, D.E. Series by Piper, South-Western.

5. Students add up given sales and then from sales tax charts compute the correct sales tax.

UNIT VIII - MATHEMATICS OF DISTRIBUTION
Part 5 - Mathematics of Management

Length:	Open
Prerequisite:	Unit one in Mathematics of Distribution.
Description:	A study of the math processes involved in supervisory or management positions.
Objectives:	Upon completion of this lesson, the student will be able to do the following: 1. Demonstrate payroll computations involved in most businesses. 2. Make out a deposit slip for a bank deposit and change slip. 3. Determine cost of shipping various pieces of merchandise by different modes of transportation using rate charts. 4. Demonstrate formulas for finding interest rates.
Sources:	Applied Business Mathematics, Piper & Gruber, 8th Ed., 1965, page 343-346.

OUTLINE

I. Payroll Procedures
  A. Computation of wages
    1. Salary
    2. Commission
    3. Deductions
      a. FICA
      b. Withholding
    4. Piece work
II. Banking
  A. Deposit slip
  C. Change slip
III. Shipping
  A. Freight Rates
    1. Train
    2. Airplane
    3. Truck
    4. Parcel Post

ACTIVITIES

1. Set up a company within a classroom and have each student be payroll clerk and figure commissions and straight time for a given company payroll.

2. Assign problems to students in shipping merchandise by various methods of transportation and different rates and figure the costs and the most efficient route and mode.

3. Have local accountant, bookkeeper, or businessman be a guest speaker on importance of math and business records.

UNIT VIII - MATHEMATICS OF DISTRIBUTION
Part 6 - Reporting Business Information

Length: Open

Prerequisite: Knowledge of business activities and Units I, II, III, IV, and V.

Description: A study of the various devices used to illustrate and report business activity and how to interpret these devices.

Objectives: Upon completion of this lesson the student will be able to do the following:

1. Construct a balance sheet, income statement, bar graph, line graph, and circle graph for a given business activity.
2. Demonstrate knowledge of devices of reporting business activity by interpreting data on graphs and balance sheet.

Sources:
Retail Merchandising, Wingate-Samson, 7th Ed., 1968, page 474-483.
Business Mathematics, Rosenbert-Lewis, 7th Ed., 1968, page 250-270.
Applied Business Mathematics, Piper-Gruber, 8th Ed., 1965, page 335-342, and 347-357.

OUTLINE

I. Balance Sheet
  A. Assets
  B. Liabilities
  C. Proprietorship
II. Income Statement
  A. Net Sales
  B. Returns and Allowances
  C. Cost of goods sold
  D. Overhead
  E. Gross profit
  F. Margin
  G. Net Profit
III. Graphs
  A. Types
    1. Line
    2. Broken Line
    3. Bar
    4. Circle
  B. Interpreting graphic data

ACTIVITIES

1. Each student construct a balance sheet figuring his personal assets, liabilities and proprietorship. Have the students see periodically if they are growing financially by preparing a personal balance sheet.

2. Class construct an income statement for the school store. Also construct a balance sheet for the school store.

3. Each student will prepare three different types of graphs illustrating three aspects of a business activity and explain or interpret graphical data to the class.

4. Each student construct and graph daily sales of the school store.

5. Have local accountant come and speak to class on the importance of reporting business information.

UNIT VIII - MATHEMATICS OF DISTRIBUTION
Part 7 - Everyday Measurements

Length: Open

Prerequisite: None

Description: Provides the student with knowledge of practical measurements found in the home and on the job.

Objectives: Upon completion of this unit the student will be able to demonstrate his understanding of denominate numbers by changing one unit of measurement into its denominate parts for all types of measurements covered in this unit deemed necessary by instructor.

Sources:
Business Mathematics, Rosenberg-Lewis, 7th Ed., 1968, page 536-537.
Mathematics for Business Occupations, Huffman, Twiss, and Whale, 1968, page 420-421.
Applied Business Mathematics, Piper-Gruber, 8th Ed., 1965, page 477-484.

OUTLINE

I. Denominate numbers
   A. Linear measurement
   B. Square
   C. Cubic
   D. Dry
   E. Liquid
   F. Large unit quantities
      1. C; CWT; M; Tons
   G. Time
II. Metric system
   A. Linear
   B. Weight
   C. Liquid and dry measurement

ACTIVITIES

1. Class discussion comparing and contrasting the metric system of numbers with the decimal system.
2. Students bring containers, tools, blocks, etc., to demonstrate uses of tables of weights and measures.
3. Sample problems available in Piper-Gruber, Applied Mathematics Workbook, 8th Ed., South-Western, and Merchandise Mathematics, D.E. Series by Piper, Southwestern.

4. Students can discuss the use of particular measurement: common to their training stations.

UNIT IX

STORE POLICY

Part 1 Merchandise Policy

2 Promotion Policies

3 Customer Policies

4 Personnel Policies

5 Community Policies

6 Credit Policies

STORE POLICY

COURSE CONTENT

PRE-COURSE DISCUSSION

I. DEFINITION OF POLICY

Carefully planned course of action in all phases of retailing

II. FUNDAMENTALS OF GOOD STORE POLICY

- A. Create desired store image (reputation)
- B. Create desired store personality (impression)
- C. Should be in writing
- D. Adhered to closely
- E. Checked often
- F. Updated
- G. Establish good morals

Small Business Management, Haibs/Hubbard, Book 2, page 173-178.

UNIT IX - STORE POLICY
Part 1 - Merchandise Policy

Length: Open

Prerequisite: Must know the meaning of policy and have an understanding of the fundamental of good store policy. Suggestion: lecture and/or class discussion.

Description: A study of merchandise policies

Objectives: At the completion of this unit the student will be able to do the following:
1. Pass with 90% accuracy a test on merchandise policy prepared by the teacher.
2. Write a set of merchandising policies concerning all areas for a given type of business.

Sources:
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 226-251.
Retail Merchandising, 7th Ed., Wingate-Rath, page 144-149, 240, 305-9
Retailing, Richert-Meyer-Haines, page 283, 426-538, 29.
Retailing Principles and Practices, 5th Ed., Richert-Haines-Meyer, page 278-286, 426-428.
Business Principles, Organization and Management, Tone-Simon, page 91-96, 116.
Marketing, Sales, Promotion and Advertising, Nolan-Warmke, 7th Ed., page 550.
Marketing and Distribution, Mason-Rath, page 21-91, 177, 239-260, and 495-522.
Business Principles and Management, 4th Ed., Shilt-Wilson, page 222.
Business Principles and Management, 5th Ed., Shilt-Carmichael, page 198-211.

OUTLINE

Merchandise Policy

1. Lines carried
2. Standards of quality
3. Standards of style and fashion
4. Price
5. When to purchase
6. Where to purchase
7. Bargain policy
8. Warranties

ACTIVITIES

1. Bargain Sales

By observation make a study of sales events of local stores. Be sure to include a variety of store types, such as high-end department store, low price range department store and middle end department store, discount store, etc. You may work in groups or individually. Find out:

1. % of markdown
2. Type of merchandise such as new, special, old stock, damaged, (as is)
3. How long is it to be or has been on sale?
4. Return policy
5. Is it a bargain-by indicating how you determined value and by doing your own comparison shopping whenever possible?
6. Write the policy on sales and returns as you think it fits these observations.

2. Starting your own business

Write a complete set of merchandise policies for your'own'business

3. Make inquiries at your own place of employment and find out what merchandise policies are followed. Are they written or implied?

4. Make a study of merchandise lines carried by at least 6 local stores. Be sure the selection of stores included the three quality lines-exclusive, middle and low end. Find out:

a. Number of different manufacturers lines. Name them.
b. Estimate the number of styles within these lines.
c. How many items in each size and/or color?
d. Which store carries the greatest variety? How does it compare in price with the others?

5. Plan an interview with 6 buyers and find out:

a. Where they buy their merchandise.
b. When they buy their merchandise.
c. How often they buy.
d. How they know what to buy.
e. Make a list of all the resources used by buyers as a result of your interview.
f. Write a merchandise policy to cover resources as you think fits the store as result of your interview.

6. Warranties and Guarantees

Select any 5 articles of merchandise about which you can obtain information regarding warranties and guarantees - there may be part of an ad., maybe on a tag or label or be in the form of a printed contract at time or purchase.

a. Give name of article and state exact words used.
b. In what ways do they differ?
c. How would you state a policy to be followed by a store in relation to these warranties?

7. Interview several of your friends, your parents, or other people to find out the kind of complaints they have made concerning merchandise. Also find out if they have received satisfactory or unsatisfactory treatment. From this, what is your conclusion about the need for a policy on returns and adjustments.

8. A well managed firm sets pricing policies and then operates consistently within these limits. This helps build store image because customers expect certain prices from the store. Using your place of employment answer the following questions:

a. Does your store price in odd numbers? Find out advantages or disadvantages of this system.
b. Do merchandise prices show in window displays. Why or why not?
c. To what extent does your store adhere to suggested retail price? Why or why not?
d. Does your store use leaders or loss lead? Give examples of leaders or loss leaders used recently? How successful were they?
e. Write a price policy for your store.

UNIT IX - STORE POLICY
Part 2 - Promotion Policies

Length: Open

Prerequisite: Must know meaning of policy and the fundamentals of good store policy - handled by lecture or class discussion(good if unit or Promotion precedes this unit)

Description: A study of promotional policies

Objectives: At the completion of this unit you will be able to write a set of promotional policies for a given business; Pass with 90% accuracy a test on promotional policy prepared by the teacher.

Sources:
Retail Merchandising, Wingate-Samson, page 390-395.
Business Principles, Organization and Management, Tone-Simon, 2nd Ed., page 143-159.
Marketing, Sales Promotion and Advertising, Nolan-Wamke, 7th Ed., page 549-570.
Display and Promotion, Gary Smith, a manual
Fundamentals of Selling, Wingate-Nolan, page 434-496.
Basic Retailing and Distribution, Reich-Levy-Feldman, page 191; 289.

OUTLINE

Promotional Policies
1. The promotional mix
2. Budget
3. Emphasis
4. Display
    a. Type to suit image desired
    b. Cost

ACTIVITIES

1. Contact at least 3 downtown business men and interview to find out:
    a. Their policy for advertising
    b. Their policy for display
    c. Their policy on any other form of promotion
    Try to obtain a copy of a promotional plan.
2. By observing the local newspaper make a collection of ads that create:
    a. An image of exclusiveness and high class merchandising.
    b. An image of "honest" bargains
    c. An image of great variety but low cost merchandise

d. An image of middle of the road prices and dependability

3. Write a set of promotional policies that would fit either your place of business or a hypothetical business of your own.
4. Take test on promotion policy as prepared by teacher.

UNIT IX - STORE POLICY
Part 3 - Customer Policies

Length: Open

Prerequisite: An understanding of the term policy and the fundamental factors that make up a set of business policy.

Description: A study of policy concerning the customer.

Objective: At the completion of this unit you will be able to pass a test with 90% accuracy on customer policy. Write a set of policies concerning customers for a given type of business enterprise.

Sources: Retailing, Principles, and Practices, 5th Ed., Rupert-Haines-Meyers, page 273-276, 428.
Fundamentals of Selling, Wingate-Nolan, 9th Ed., page 243.
Business Principles, Organization and Management 2nd Ed., Tonne-Simson, page 131-135.
Retail Merchandising, Wingate-Simson, page 150-155.
Marketing and Distribution, Mason-Rath, page 5, 89-91, 161-162, 497-500.
Basic Retailing and Distribution, Reich-Levy-Feldman, page 192-192.

OUTLINE

Decisions Of Policy Will Have To Be Made For:

1. Salespeople vs selfservice
2. Installation, repair, alterations
3. Layaway
4. Delivery
5. Gift wrap, mail
6. Restrooms
7. Returns and adjustments
8. Parking
9. Special and Misc.

ACTIVITIES

1. From your reading and personal observation make a list of customer services other than those listed above.
2. List the various types of store services that your store provides for its customers. Which ones are most frequently used by your customers? Find out from your employer if there is direct evidence that this service has increased sales enough to justify cost. If you had authority would you offer more services?

3. Make a study of delivery service offered by your town. If a large town, choose the stores for study that will provide a cross section of types and quality. Find out:
   a. Days of delivery
   b. Time package must be ready for delivery at store (necessary for salespeople to know).
   c. What instructions must go on package? (get a sample of delivery forms where possible)
   d. Is there a minimum of sale required?
   e. Chart results of study
   f. Write a delivery policy for each store observed.
4. Make a study of returned goods policy of your area. Be sure to include your place of business. Find out:
   a. How are these policies stated or implied?
   b. Does the store always adhere to the policy as stated? Give examples.
   c. What information is required by the store before an adjustment is made? Why is this information necessary?
5. Make up a questionaire about the services merchants have to offer. Leave a place for name, address, type of business. Compile the results. You can work in groups in order to completely cover a shopping area of your choice.

UNIT IX - STORE POLICY
Part 4 - Personnel Policies

Length: Open

Prerequisite: Know the meaning of "policy" and have an understanding of the fundamentals of good store policy.

Description: A study of Personnel Policy

Objectives: At the completion of this unit **you will** be able to list with 90% accuracy all areas covered in writing up a personnel policy for a given store. You will be able to list with 100% accuracy the various wage plans available by business.

Sources:
Creative Selling, Johnson, page 76.
Retailing Principles and Practices, 5th Ed., Richert-Meyer-Haines, page 108, 429.
Fundamentals of Selling, 9th Ed., Wingate-Samson, page 248-251.
Retail Merchandising, 7th Ed., Wingate-Samson, page 171-176.
Marketing and Distributing, Mason-Rath, page 90, 183-184.
Business Principles and Management, Shilt-Carmichael, page 437-450. and 564-565.
Business Principles, Organizations and Management, 2nd Ed., Tonne-Simson, page 288-297.
Business Retailing and Distribution, 2nd Ed., Reich-Levy-Feldman, page 397-401.

OUTLINE

Personnel Policy
1. Hiring and firing
2. Interstore promotions
3. Wage plans
4. Training
5. Vacations
6. Discounts
7. Hours
8. Retirement and fringe benefits

ACTIVITIES

I. Wage Plans
   a. Describe the wage plan by which you are paid. Give advantages and disadvantages of this plan.
   b. Describe other wage plans used by other places of business or other areas in your place of business. To what type of job does each apply?

Wage Plan	Type of Employee

2. Make a survey of training programs offered employees by business in your community. Include retailing, services, transportation and wholesaling. Find out:
   a. Length of training
   b. What they cover
   c. Type of business

   How would you think the policy on training could be worded to cover the situation as you have observed it?

3. By using the telephone directory make a list of all labor sources your city provides. Also survey your working friends and find out how they got their jobs.

   TABULATE

Business	How Hired	Policy

   Did you find some business with no hiring policy? Which business has a strict hiring policy?

4. Go to a department store and ask for copies of their retirement plans and fringe benefits. You will find that most stores are more than willing to talk about fringe benefits.

5. Make a survey of class members and find out how many receive discounts on a purchase. If not will they be eligible in the future? What type of stores offer discounts? How would you write the discount policy for your store?

6. Do some extra reading on working hours for future workers. Make a report to the class.

7. What is your store policy on vacations? How does it compare with other similar stores? Do you agree with these policies? Explain.

8. Continuing project--Write the personnel policies for "Starting Your Own Business".

UNIT IX - STORE POLICY
Part 5 - Community Policies

Length: Open

Prerequisite: An understanding of the meaning of the word policy and a knowledge of the factors that make up a good set of policies for a business.

Description: A study of policies that deal with business and the community. Essentially an area of "good will".

Objectives: On completion of this study you will be able to write a set of policies that will cover the store's actions concerning the community.

Sources: Retail Merchandising, Wingate-Samson, 7th Ed., page 155-156.
Marketing and Distribution, Mason-Rath, page 109-431.
Retailing Principles and Practices, Richert-Meyers, page 107.

OUTLINE

Community Policy
1. Civic participation
2. Local charities
3. Windows for civic use
4. Club dues
5. Meeting rooms
6. Fund raising campaigns
7. Space for group sales - theatre tickets, etc.

ACTIVITIES

1. Group or individual project:
   Contact at least 15 businesses and find out:
   a. How many times they are asked for money donations.
   b. For merchandise donations
   c. Contribute to a fund raising campaign
   From this write a policy that will protect the business man yet still estabilsh good public reltaions in the community.

2. Make a list of all clubs in your area business men join.
   Do you think this expense is necessary? Why?

3. Describe any window displays you have seen that are solely civic minded.

How often do you see them in your community? Does it cost the business man anything?

4. Which stores in your community have sales space allowed for entertainment events? In what way is this good for the store?

5. Write up a set of policies that you think would be fair for all of the above areas.

UNIT IX - STORE POLICY
Part 6 - Credit

Length: Open

Prerequisite:

Description: A study of the policies essential for a store to establish to make it clear to both customer and sales force how to handle credit.

Objectives: At completion of this unit a student will be able to write a set of credit policies for any given store.

Sources: Marketing and Distribution, Mason-Rath, page 20-21, and 486-493.
Retailing Principles and Practices, 5th Ed., Richert-Meyer, Page 395-396.
Retail Merchandising, 7th Ed., Wingate-Samson, page 158-159.
Business Principles, Organization and Management, 2nd Ed., Tonne-Simcox, page 203-205.
Business Principles and Management, 4th Ed., Shilt-Wilson, page 440-442.
Basic Retail Credit, University of Texas, Manual 1970.
Credit and Collection, Donald Kahns, Southwestern Manual.

OUTLINE

1. Granting of credit
2. Type of credit granted
3. Standardization of terms
4. Collection standards
5. Method of billing

ACTIVITIES

1. Interview a credit manager - find out:
   a. Types of credit offered
   b. Get example of credit application forms - be sure you include credit cards.
   c. Get example of collection form letter.
   d. Tabulate results as a group - Would you classify each as a strict or liberal credit policy?

2. Do a research on granting teen-age credit. Is this available in your community? What are the advantages and disadvantages?

3. Write a paper on the advantage of credit for the businessman and the consumer. What is your opinion of credit and the future of retailing?

4. Make a list of all terms used in the area of credit.

5. Write a set of credit policies for your store (project "Starting Your Own Business") or any given business provided by teachers.

UNIT X

STORE SECURITY

Part 1 Short Change, Counterfeit, Shoplifting, and Robbery

2 Cashing Checks

UNIT X - STORE SECURITY
Part 1 - Short Change, Counterfeit, Shoplifting and Robbery

Length: Open

Prerequisite: None

Description: To teach the student the different aspects of store security and how to handle security problems.

Objectives: Upon completion of this lesson the student will be able to:
1. Recognize store security problems and deal with them.
2. Pass a store security test with 100% accuracy.

Sources:

Retailing, Richert, Meyers, Haines, 1968, page 264-266, 182-185.
A Study Guide To Efficient Market Checking, Jackson, 1969, page 283-291, 153-156.
Instructors Guide (Acura-Touch School), Riggs, 1970, Appendix B Test No. 3, Appendix A Handout No. 46.
Preventing Burglary and Robbery Loss, SBA, 1968.
Guide to Retailers, Association of Washington Business, 1970.
Shoplifting A Study Guide
Preventing Retail Theft, SBA, 1970.
Reducing Shoplifting Losses, SBA, 1970.

OUTLINE

I. Money Manipulators and Short Change Artists
    A. Till Dippers
    B. Change Droppers
    C. Diverters
    D. Change manipulators
    E. Marked bill passers
    F. Short Changers
    G. Split bill passers
    H. How to handle money manipulators
II. Counterfeit Money
    A. Points to observe in bills
        1. Portrait
        2. Colored seal
        3. Serial number
        4. Paper
        5. Ink
    B. Points to observe in coins
        1. Workmanship

2. Sound
3. Feel
4. Reeding (corrugate edge)
5. Metals
C. Procedure to follow if given counterfeit money
1. Know not to return it.
2. Telephone police.
3. Delay passer
4. Avoid argument
5. Obtain description of passer
6. Obtain license number of passer's car.
III. Shoplifting
A. Common methods of Shoplifting
1. Palming
2. Crowds
3. Handling
4. Accomplices
5. Concealment
B. Shoplifters' tools
1. Large coat
2. False pockets
3. False boxes
4. Between legs
5. Umbrella
6. Etc.
C. Causes of Shoplifting
D. Prevention
1. Greet customer promptly
2. Observe people dressed strangely
E. Types of Shoplifters
1. House-wives
2. Store personnel
3. Teenagers
4. Professionals
F. Shoplifting law
1. Purpose of law
2. Who is permitted to make a lawful detention
3. What does the law permit?
4. What are the ground rules for such detention?
5. How does the law protect the merchant?
IV. Robbery
A. How to prevent robberies
B. What to do when held up
C. How to obtain a description

ACTIVITIES

1. Read form entitled "Store Security". (refer to enclosed activity)
2. Read "Guide to Retailers",
3. Read "Preventing Burglary and Robbery Loss".
4. Have the local police department discuss store security.

5. Have students make shoplifting prevention posters to be displayed in local stores.

6. Have students devise anti-shoplifting ads to be run in local and school paper.

7. Have students develop a shoplifting prevention brochure to be distributed to local businesses.

8. Have students take the store Security Test (refer to enclosed activity 8).

UNIT X - STORE SECURITY
Part 1 - Short Change, Counterfeit, Shoplifting, and Robbery
Activity 1 - Store Security

I. Shoplifting:
   1. The average customer is interested in the products she is buying. Her focus of attention is on the item. A potential shoplifter on the other hand, selects the item he plans to steal then looks around the store to see if he is being watched. The police refer to this as a shoplifters M.O.

   2. When working in the aisles offer assistance to the customer. Just because a store is self-service does not mean that customers should be ignored. This will increase sales and minimize shoplifting.

   3. Shoplifters do not steal large inexpensive items. Some popular items preferred by shoplifters are women's hose, cosmetics, vitamins, records, steaks, lunchmeats, cigarettes, small tins of high priced items, such as crab meat.

   4. Shoplifters conceal items in coats, purses, newspapers, magazines, between the legs.

   5. Of someone appears to have stolen an item, be sure you know what was stolen and where it is hidden. Call the store manager.

II. Checks:
   1. Be sure that you understand and follow store policy. It is designed to minimize losses due to bad checks.
   2. Checks to watch out for--Out of Town, Government, Payroll.
   3. If in doubt, call the store manager. Have the box boy get the car license number.

III. Money Manipulators - Short Change artists:
   1. You can't win. Don't try.

   2. These individuals short change you by getting you confused. They generally start passing money back and forth asking for change or different denominations of bills. Call the store manager to handle any change transactions.

   3. The drop artist drops a bill from his change on the floor and claims that you short changed him. Always call the store manager if a customer claims you short changed him.

IV. Till-Tappers:
   These individuals work in various ways but the following are the most common.

1. They will push some change on the floor and while you are picking it up they help themselves from the cash drawer.

2. They will send you to the back of the store to get an item and help themselves while you are gone.

3. Marked bill artists work in teams of two. The first customer will give you a $20 bill with some identifying mark. The second member of the team will give you a $5 or $10 bill. He will then claim he gave you a $20 and can prove it by remembering the identifying mark, usually a phone number, on the bill.

4. Rule: Do not leave your cash drawer open when your back is turned. Do not leave your checkstand unless register is locked. Call manager when customer claims you short changed her.

V. Robbers:

1. Better to be a live coward than a dead hero. Do what you are told.

2. Get a description. Better to notice one or two features than to try to remember everything. Look for some characteristic peculiar to the individual; scar, limp, color of skin, color of eyes, mannerism, voice, then write it down as soon as possible. Don't trust your memory.

UNIT X - STORE SECURITY
Part 1 - Short Change, Counterfeit, Shoplifting, and Robbery
Activity 8 - Test: Store Security

NAME:______________________________ Date:______________________

Score:______________________

1. Describe the behavior pattern of a potential shoplifter?
2. What should you do if you observe someone shoplifting?
3. How can you minimize shoplifting?
4. How can you prevent till tapping?
5. How can you prevent being short changed?
6. What should you do when a robbery occurs?

UNIT X - STORE SECURITY
Part 2 - Cashing Checks

Length: Open

Prerequisite: The ability to add and subtract.

Description: To teach the student the proper way to cash a check.

Objectives: Upon completion of this lesson the student will be able to:

1. Cash checks properly
2. Avoid being duped by a bad check passer.

Sources: Retailing, Richert, Meyers, Haines, 1968, page 250-251.
A Study Guide To Efficient Market Checking, Jackson, 1969, page 171-175.

Instructor's Guide(Acura-Touch School), Riggs, 1970, page 60, Appendix B, Test No. 10.
Outwitting Bad Check Passers, Kolodny, SBA, 1969.
Guide to Retailers, Association of Washington Business, 1972.
Local Banks

OUTLINE

I. Limit Of Responsibility
II. Customer Identification
    A. Acceptable
    B. Not acceptable
III. Checker Identification
    A.
        1   20.00

        15.95   RMH
    B. One is placed in the upper left corner (this is the check stand number), $15.95 is the amount of purchase, $20.00 is the amount of the check, RMH is the initial of the checker.
IV. Post-dated Checks
V. Out-dated Checks
VI. Second Party Checks
VII. Bank Numbers
VIII. Magnetic Numbers
IX. How To Read A Check
X. Travelers Checks

ACTIVITIES

1. Read "Guide to Retailers.'
2. Read "Outwitting Bad Check Passers."
3. Use check blanks for student role playing.
4. Complete the form called "Check Cashing" work sheet. (Attached Activity 4)
5. Complete the test with 100% accuracy. (Attached Activity 5)

UNIT X - STORE SECURITY
Part 2 - Cashing Checks
Activity 4 - Cashing Checks Worksheet

1. Customers are often offended when a checker questions or refuses to cash a check. When new on the job, advise the customer that you are new and must have approval. Know your customers as rapidly as possible.

2. Most stores require that a checker enter the following information on the face of a check.

A. Amount of check
B. Amount of Purchase
C. Checker's initials
D. Checkstand Number

This is accomplished as illustrated on the check below.

Date ____________________

Amount ____

Find a Blank Check to Enter Here

3. Most stores require that a checker enter the following information on the back of a check; if the customer is not known by the checker. A. Credit card number and name, eg; J.C. Penny, 818-051-077-1-4. B. Voters registration card. C. Driver's License is valid and a car license number is.

4. Most stores limit the amount of change a checker may give a customer when accepting a personal check. Why? ____________________

5. Most stores will not accept a second party check. Why? ____________________

Write a second party check.

6. Most stores will not allow checkers to cash payroll, government or bank checks. Why? ____________________

7. Most stores will not accept post-dated checks. Why?

Write a post-dated check.

8. Checks with restrictive endorsements are unacceptable. Why?

Write a check with a restrictive endorsement.

9. Most stores require that a customer not only sign a personal check properly, but also require that the customer enter under the signature, his telephone number and address. Why?

Write a check and follow these instructions.

10. A check written in pencil is unacceptable. Why?

11. Counter checks and checks without required micrencoding are unacceptable. Why?

Attach a Counter Check in space provided.

12. Be sure to read each check carefully. An honest person does forget, or makes a mistake. Be sure figures and written amounts agree.

13. All stores require that each check be stamped with what is referred to as a bank stamp. Why?

Where?

14. Can you think of other things you should know about cashing checks. Why?

15. Consult a Store Manager. What other instructions did he give you for cashing checks?

UNIT X - STORE SECURITY
Part 2 - Cashing Checks
Activity 5 - Test: Cashing Checks

NAME: ____ Date: ____________________

Score: ____________________

1. What does NSF stand for and what information is provided to the checker to minimize loss due to NSF?
2. Why must a checker be particularly careful when cashing government checks?
3. List four good identifications.
4. What is a post-dated check? Is it acceptable?
5. What is a second-party check? Is it acceptable?
6. Would you cash a check on an out-of-town bank? Explain your answer.
7. What is a "bank stamp"? Why is it used? Where on the check is the stamp used?
8. Most stores require that the checker enter four items of information. Give an example of how this is done.
9. Why is it important to "read" a check?
10. There is one good rule for cashing checks. What is it?
11. List your reasons for not accepting the following check. The purchase was $68.50.

First National Bank, Bellingham

78-4041
1335

No. __________

Date Jan 31 1971

Pay to Beverly Monroe Amount 73 50

Seventy Five and 50/100 Dollars ___

Charter Check

Signed: Walter A Riggs

12. Enter on the check the required information assuming the check above was good and the purchase was $68.50 and you were checking in checkstand No. 5.

UNIT XI

CASH REGISTER

Part 1 Machine Operation

2 Acura-Touch

3 Making Change and Money Handling

4 Cashing Checks (Refer to Unit X)

NOTE TO INSTRUCTOR

It is essential that the instructor obtain a copy of the text A Study Guide to Efficient Market Checking by Carl N. Jackson. Information on ordering this text may be obtained from the bibliography.

UNIT XI - CASH REGISTER
Part 1 - Machine Operation

Length: Open

Prerequisite: Access to a cash register or a variety of cash registers.

Description: To teach the student how to operate a cash register.

Objectives: Upon completion of this lesson the student will be able to demonstrate, with complete accuracy, the following cash register procedures:

1. Operation of the machine.
2. Putting receipt and detail tapes in the machine.
3. Setting dates and consecutive receipt numbers.
4. Handling emergencies
5. Read and reset the machines.
6. Prevent operation of the machine.

Sources: Retailing, Richer, Meyers, Haines, 5th Ed., 1968, page 258-263.
A Study Guide to Efficient Market Checking, Jackson, 1969, page 12-30, 57-63, 141-145, 177-178, 193-199, 213-216.
Instructors Guide (Acura-Touch), Riggs, 1970, page 34-36.

OUTLINE

- I. Cash Register Operation
  - A. Indicators
  - B. Amount keyboard
  - C. Salesperson's keys
  - D. Department keys
  - E. Key release lever
  - F. Printers
- II. Receipt and Detail Tapes
  - A. When to install
  - B. How to install
- III. Setting Dates and Consecutive Receipt Numbers
  - A. How to set the date
  - B. How to set the consecutive receipt numbers
- IV. Handling Emergencies
  - A. Preventing jams
  - B. Clearing jams
  - C. Release the cash drawer
  - D. Key release lever
  - E. Crank and electric failure

V. Read and Reset the Cash Register
   A. How to read the cash register
      1. Keys
      2. Departments
      3. Cash totals
   B. How to reset the cash register
      1. Keys
      2. Departments
      3. Cash totals

VI. Prevent Operation
   A. Key lock
   B. Remove cash drawer

ACTIVITIES

A. Demonstration by the instructor on the following:
   1. Receipt and detail tapes
   2. Dates and consecutive receipt numbers
   3. Emergencies
   4. Read and reset register
   5. Prevent operation of register

B. Demonstration by the instructor on the location and purpose of the following:
   1. Indicator
   2. Amount keyboard
   3. Salesperson's keys
   4. Department keys
   5. Key release lever
   6. Printer

C. Students will practice on cash register the activities in Activity 1, Part 2.

UNIT XI - CASH REGISTER
Part 2 - Acura-Touch

Length: Open

Prerequisite: A good background in the operation of a cash register.

Description: To teach the student to operate the keyboard of a cash register without looking at its keys.

Objectives: Upon completion of this lesson the student will be able to:
1. Operate the cash register without looking at the keys.
2. The student will be able to complete a test with no errors.

Sources: Instructor's Guide (Acura-Touch School), Riggs, 1970, Appendix A, Handout No. 51, Appendix B., Test No. 1.

OUTLINE

I. Home Position
II. Three Rules For Acura-Touch
    A. Find the keyboard by feel.
    B. Don't lift fingers from keyboard.
    C. Home position is last number rung.

ACTIVITIES

1. Read the instructions for teaching Acura-Touch.(refer to enclosed Activity 1)
2. Complete Acura-Touch Drill Book, Lesson 9. (refer to enclosed Activity 2)
3. Complete final examination, (refer to enclosed Activity 3).

UNIT XI - CASH REGISTER
Part 2 - Acura Touch
Activity 1 - Instructions for Teaching Acura-Touch.

1. The name of the game is accuracy. Continually stress the importance of going slowly, learning the keyboard. If the total is incorrect they are going too fast.

2. To aid students, if braile keys are not used, glue pieces of sandpaper to the 20, 50 and 7 keys.

3. As the student progresses through the lessons and drill exercises, he will learn the relationship of a number registered to the number to be registered. When this occurs, the student will no longer use the sandpapered home keys. These will be used by the student to locate home position only when he removes his hand from the register.

4. The thumb and index finger are to be used for numbered keys. There are two exceptions. The first exception will be found in lesson #5 in the drill book. The second exception is on a register with a curved keyboard where the keyboard is too long to ring 19 using thumb and index finger. In this case, the student may use the middle finger to register number 9.

5. The middle finger is to be used to push the department keys on those registers where the department keys are located at the upper right side of the keyboard.

6. On the SWEDA power penny, the department keys are to be pushed with the thumb. The student has a choice of using the thumb on either hand. If using the thumb on the right hand causes the student to remove his hand from the keyboard, he should use the thumb on his left hand.

7. Those keys on the ledger side of the register such as amount tendered, change, void, etc., are to be pushed as follows. If the key to be pushed is below the center of the keyboard, the key is to be pushed with the thumb. If above center, the key-to be pushed with the middle finger.

8. The motor bar is to be pushed with the side of the hand or little finger whichever is convenient.

9. On change computation registers, the cash tendered or amount tendered key is raised higher than the other keys. This key is to be pushed with one side of the hand.

10. A shield is to be used to conceal the keys so the student learns that he can locate the keys accurately without using the eyes.

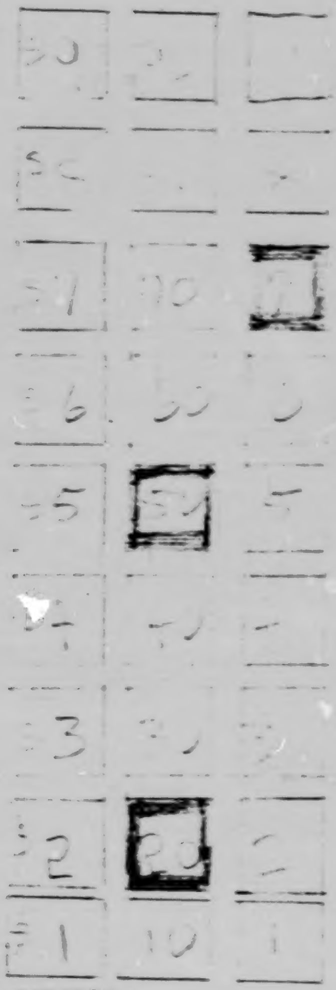
11. After a few hours the shield should be removed so the student will discipline himself not to look. Tell the student the shield will be returned to the register if he has not yet developed the ability to ring the register without looking.

12. The student is not to lift his thumb and finger from the keyboard while learning key location. They must slide the thumb and finger from one set of numbers to the next set. In other words they must feel their way from number to number until confidence is developed.

13. Student is to push both keys at once when ringing numbers involving two keys. Example: When ringing 29¢ place the thumb on the 20, the index finger on 9, then push both keys down simultaneously.

UNIT XI - CASH REGISTER
Part 2 - Acura-Touch
Activity 2 - Acura-Touch Drill Book

Instructions For Home Key Locations



Materials: A. Scotch mounting squares
This is a two-sided adhesive.

B. Course grit sandpaper.

Cut adhesive and sandpaper in squares (not round) to size needed to cover key. Cover the 20, 50, and 7 key as shown.

Lesson #1

ACURA-TOUCH DRILL EXERCISES*

	I	II	III	IV	V
	27	27	26	17	18
	28	29	29	56	25
	29	28	15	59	39
	27	26	13	13	29
	26	25	23	34	57
	25	35	24	19	13
	27	37	35	59	36
	17	47	45	57	14
	16	49	49	12	56
	26	39	37	23	12
	27	37	59	29	47
	28	35	35	34	34
TOTALS	303	414	390	412	380

RHYTHM GUIDE: When the second digit of a price is higher than the first, use the index finger on the second digit.

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Lesson #2

ACURA-TOUCH DRILL EXERCISES*

RHYTHM GUIDE: When the second digit of a price is lower than the first, use the thumb on the second digit and the index finger on the first.

	I	II	III	IV	V
	72	84	93	51	54
	71	85	63	31	64
	63	41	54	21	62
	95	74	64	53	73
	61	82	71	43	81
	81	53	53	86	86
	91	95	43	73	75
	95	71	41	81	76
	75	83	75	31	42
	52	52	76	32	52
	51	96	96	21	54
	41	41	86	31	43
TOTALS	848	857	815	554	762

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Lesson #3

ACURA-TOUCH EXERCISE DRILLS*

RHYTHM GUIDE: If the price contains only one digit, ring up $3 -- 30¢ -- 3¢ keys and below with the thumb. Ring up $4 -- 40¢ -- 4¢ and above with index finger.

	I	II	III	IV	V
	.03	3.00	.10	.20	.50
	.30	.30	.30	.70	.08
	.05	.03	1.00	4.00	.40
	.30	.09	.70	1.00	.20
	.10	.07	.40	.03	.03
	.20	.70	.09	.07	3.00
	.50	.60	2.00	.60	7.00
	.80	.90	.30	.05	.09
	.07	.30	.02	.09	.60
	.02	.02	3.00	.70	.80
	.09	.07	.60	6.00	.40
	.07	.04	.10	.30	.20
TOTALS	2.53	6.12	8.61	13.74	13.30

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Lesson #4

ACURA-TOUCH DRILL EXERCISES*

	I	II	III	IV	V
	27	15	75	24	17
	25	19	81	41	75
	23	29	17	49	76
	49	91	39	36	83
	45	31	27	17	18
	39	32	25	29	29
	93	49	23	25	13
	85	59	21	51	51
	61	19	41	59	23
	41	52	49	47	53
	49	31	45	41	32
	37	21	41	32	14
TOTALS	574	448	484	451	484

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Lesson #5

ACURA-TOUCH DRILL EXERCISES*

RULE ONE: Use thumb for 11 - 22 - 33 - 44

RULE TWO: Use index finger and middle finger for 55 - 66 - 77 - 88 - 99

67 - 68 - 69

78 - 79

88 - 89

98 - 99

You can go down one key with your middle finger. You can go up two keys with your middle finger.

11 - 22 - 33 - 22 - 44 - 11 - 33 - 22

66 - 67 - 68 - 55 - 56 - 57 - 78 - 79 - 77

88 - 89 - 88 - 87 - 77 - 76 - 78 - 79

55 - 56 - 57 - 11 - 33 - 44 - 22 - 11

66 - 77 - 55 - 66 - 67 - 68 - 77 - 78

79 - 88 - 89 - 99 - 11 - 33 - 22 - 68

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Lesson #6

ACURA-TOUCH DRILL EXERCISES*

I	II	III	IV	V	VI
20	24	29	27	55	29
27	23	49	17	59	25
17	27	57	99	44	39
27	29	55	88	42	19
37	27	56	27	62	10
36	25	59	22	37	59
35	35	58	25	29	23
25	37	66	51	15	47
26	39	69	41	13	37
16	49	67	33	56	33
15	47	66	31	69	15
14	45	77	32	52	35
295	407	708	553	533	27
					398

Practice column six more than others -- 53% of all ring-ups are with these 13 numbers.

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Lesson #7

ACURA-TOUCH DRILL EXERCISES *

	I	II	III	IV	V
	11	88	66	11	44
	22	55	69	33	89
	33	11	55	66	88
	66	22	44	78	87
	22	66	88	87	55
	99	67	89	97	22
	55	77	87	89	66
	44	79	22	99	11
	11	88	33	55	68
	33	87	11	44	66
	22	99	97	11	69
	11	98	79	22	87
TOTALS	429	837	740	692	752

---

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2/20/70

ACURA-TOUCH DRILL EXERCISES*

I	II	III	IV	V
10	1.23	.82	4.20	.31
27	.31	.95	.59	.27
29	.44	2.27	.51	.19
19	.49	.21	.56	.29
39	.44	.45	.54	.25
63	.41	.44	.77	.45
67	.14	.39	.95	.37
65	.19	.33	.96	2.22
56	.65	1.99	1.08	.50
59	.69	.41	.04	.56
29	.59	.45	.47	.43
21	.55	.42	.40	.21
4.84	6.13	9.13	11.07	6.05

---

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Lesson #9

ACURA-TOUCH DRILL EXERCISES*

I	II	III	IV	V
20	08	26	44	82
02	02	60	42	68
04	04	66	46	28
08	20	68	69	64
06	24	20	64	42
02	26	28	62	66
20	28	80	82	28
22	40	88	86	62
40	44	66	84	48
60	46	44	66	22
80	48	22	88	200
20	40	24	86	222
284	330	592	792	932

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COORDINATING COUNCIL FOR OCCUPATIONAL EDUCATION

Distributive Education

Test No. 1

Final Examination

ACURA-TOUCH

Name: ______________________________ Errors: ____________________

Date: ____________________ Time: ____________________

Minimum competency required for diploma, time 3 minutes, with no mistakes. A professional checker can do this test in 1 minute, 40 seconds with no mistakes.

24
23
22
32
31
25
20
38
24
25
17
34
15
69
34
15

59
35
52
31
38
28
28
35
20
51
31
35
41
19
23
27

61
44
11
22
24
41
27
13
09
19
43
23
54
41
14
62

51
65
57
43
33
81
35
53
56
23
26
27
39
15
26
27

39
15
25
17
21
04
37
48
91
99
98
19
13
30
16
29
24

Total 27.91

COORDINATING COUNCIL FOR OCCUPATIONAL EDUCATION

Distributive Education

Test No. 1

Final Examination

ACURA-TOUCH

Name: ______________________________ Errors: ______________

Date: ____________________ Time: ______________

Minimum competency required for diploma, time: 3 minutes, with no mistakes. A professional checker can do this test in one and one-half minutes with no mistakes.

22 GR	69 MT	02 TX	44 MT		95
81 MT	09 PR	79 MT	49 PR		30
38 PR	05 GR	23 PR	69 MT		03
41 GR	04 PR	50 MT	13 GR		72
28 PR	28 GR	59 MT	09 PR		69
91 MT	73 MT	35 PR	05 PR		03
14 PR	48 PR	52 GR	43 GR		65
62 MT	61 MT	38 MT	02 TX		05
07 PR	19 GR	61 PR	54 MT		28
29 GR	32 GR	20 GR	35 GR		94
76 MT	01 TX	01 TX	01 TX		04
13 PR	89 MT	91 MT	09 GR		49
68 MT	02 GR	17 PR	63 PR		82
33 GR	07 PR	41 GR	16 GR		11
01 TX	55 GR	02 TX	01 TX		56
				Total	27.56

UNIT XI - CASH REGISTER
Part 3 - Making Change and Money Handling

Length:	Open
Prerequisite:	Be able to add and subtract.
Description:	To teach the proper way to make change and handle money.
Objectives:	1. The student will be able to count change accurately. 2. The student will be able to operate a change computer. 3. The student will be able to complete the test with 100% accuracy.
Sources:	Retailing, Richert, Meyers, Haines, 1968, page 258-267. A Study Guide to Efficient Market Checking, Jackson, 1969, page 115-121, 155-160. Instructors Guide (Acura-Touch School), Riggs, 1970, Appendix B., Test No. 6. NCR Tips for Making Change, (NCR Company)

OUTLINE

I. Change Fund
    A. Purpose of a change fund.
    B. Check change fund.
II. Arranging the Cash Drawer
III. Counting Back Change
    A. To self
    B. To the customer
IV. Change Computer

ACTIVITIES

1. Instructor demonstration of the use of a change computer, to be followed by student practice.
2. Complete the form called "Making Change". (refer to enclosed Activity 1)
3. Through role-playing, with another student, practice counting back and making change.
4. With the use of play money, practice arranging the cash drawer.
5. Complete the enclosed test with 100% accuracy. (refer to enclosed activity 2).

UNIT XI - CASH REGISTER
Part 3 - Change Making and Money Handling
Activity 1 - Making Change

MAKING CHANGE

		change due									
Amount of Purchase	Bill Given In Payment	1¢	5¢	10¢	25¢	50¢	$1	$5	$10	$20	Total Amount of Change
8 45	10 00										
7 13	10 00										
3 24	5 00										
12 17	20 00										
17.15	20.00										
11 46	15 00										
9 45	10. 00										
6 72	7 00										
4 13	5 00										
7 77	8 00										
2.2 3	[illegible] 00										
8 55	[illegible] 00										
8 50	10 00										
27 50	30 00										
31 93	32 00										
29 53	30 00										
41 46	45 00										
2 49	3 00										
4. 56	5 00										
3 47	4 00										
2 19	2 59										
3 44	3 97										
1.47	2 07										

UNIT XI - CASH REGISTER
Part 3 - Making Change and Money Handling
Activity 2 - Test Key

1. To ensure that the change fund is correct

2. On the change plate. To eliminate errors.

3. Count the change to the clerk then recount the change to the Enables the clerk to double check.

4. The face should be up on all bills, facing the same direction.

5.

Rolls	$20.00	$10.00	$5.00	$1.00
50¢	25c	10¢	5c	1c

6. Under the cash drawer. That they do not slip under the machine and get lost.

COORDINATING COUNCIL FOR OCCUPATIONAL EDUCATION

Distributive Education

Test No. 6

Final Examination

CHANGE MAKING AND MONEY HANDLING

Name:______________________________ DATE:______________

Score:______________

1. Whether a store manager requires it or not, it is a good idea to count the money in the cash drawer at the beginning and end of each shift. Why?

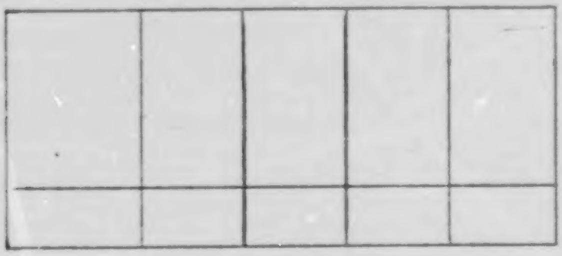
2. Where should money tendered be placed while making change? Why?

3. The procedure for removing change from register and giving it to the customer is done in two steps. What are they and why must this procedure be followed?

4. What side of a paper bill should be up and which direction should it face?

5. Enter in the cash drawer below where you would place the following:

   1¢ - 5¢ - 10¢ - 25 ¢ - 50¢ - $1 Bill - $5 Bill - $10 Bill - $20 Bill



6. Where would you place checks, coupons, and large bills? What care must be exercised when doing so?

7. (See Next Page)

8. (See Next Page)

Test No. 6

Name: ______________________ Date: ______________

Score: ______________

7. Making Change - Regular Method

DIRECTIONS: Use as few coins and currency as possible when making change.

Denominations	01¢	05¢	10¢	25¢	50¢	One Dollar	Five Dollars	Result
EXAMPLE: 4.33 out of 10.	2	1	1		1		1	10.00
17¢ out of 50¢								50¢
2.73 out of 5.								5.00
1.29 out of 5.								5.00
81¢ out of 1.								1.00
39¢ out of 10.								10.00
21¢ out of 50¢								50¢
7.57 out of 10.								10.00
3.02 out of 5.								5.00
2.76 out of 10.								10.00
1.57 out of 5.								5.00
51¢ out of 75¢								75¢
2.01 out of 2.50								2.50
7.53 out of 10.								10.00
6.47 out of 20.								20.00
54¢ out of 1.04								1.04
76¢ out of 1.01								1.01

Test No. 6

Name:______________________________ Date:______________

Score:______________

8. Making Change - When Using Change Computing Register

DIRECTIONS: Use as few coins and currency as possible. Enter number of each used.

Denominations	Five Dollars	One Dollar	50¢	25¢	10¢	05¢	01¢
EXAMPLE: Your Change $9.32	1	4		1		1	2
" " 0.24							
" " 2.73							
" " 3.29							
" " 0.83							
" " 0.44							
" " 2.21							
" " 6.37							
" " 3.07							
" " 2.76							
" " 1.58							
" " 0.62							
" " 8.65							
" " 7.49							
" " 4.27							
" " 5.91							
" " 6.19							

UNIT XII

SALES PROMOTION

Part 1 Merchandising Through Advertising
2 Creating the Advertisement
3 Advertising Media
4 Planning the Advertising Campaign
5 Merchandising Through Display
6 Display Concepts
7 Types of Display

UNIT XII - SALES PROMOTION

Part 1 - Merchandising Through Advertising

Length: Open

Prerequisite: A general knowledge of the importance of sales promotion.

Description: A study of sales promotion, advertising, and publicity.

Objective: At the completion of this lesson a student will be able to do the following:

1. The student will be able to define sales promotion, advertising and publicity and explain the differences between the three in writing.
2. The student will be able to list in writing the purposes of advertising.
3. The student will be able to explain the trends effecting advertising.
4. The student will be able to define Institutional Ad and Promotional Ad and explain the difference between the two in writing.
5. The student will be able to identify the limitations of advertising.

Sources:

Advertising & Displaying Merchandise, Harland Samson, page 1-7.

Marketing, Sales Promotion and Advertising, Nolan-Warmke, 7th Ed., page 6, 187-204, 255,264.

Fundamentals of Selling, Wingate-Nolan, 9th Ed., page 434-440.

Advertising, W.H. Antrim, page 1-12.

Obtain 35mm slides on Advertising from Ohio State University, D.E. Materials Lab, 124 W. 17th Ave., Columbus, Ohio 45210 $6.00 - Script included.

Free Advertising materials, page 18 and 19 of Vocational Instructional Materials for Distributive Education available, from Federal Agencies.

OUTLINE

I. Sales Promotion: Those marketing activities, other than personal selling, advertising and publicity, that stimulate consumer purchasing and dealer effectiveness; such as display, shows and exhibitions, demonstrations, and various non-recurrent selling effects not in the ordinary routine.

II. Advertising: Advertising is any paid form of non-personal presentation and promotion of ideas, goods, or services by an identified sponsor.

III. Publicity: Publicity is information about a company or its products appearing in mass communication media because of its newsworthiness and without thought of payment for time or space.

IV. Institutional and Promotional Advertising
   A. Define Each
   B. Why, When, and Where to use each.

V. Purposes of Advertising
   A. Increase sales volume, profit.
   B. Secure more outlets for products.
   C. Increase product or service consumption.
   D. Introduce new products.
   E. Build a reputation
   F. Create confidence and good will.

VI. Trends Effecting Advertising--Social, Economic, and Technological Changes in American Life.
   A. The mobility of the public via automobile
   B. The growth of suberbs and development of shopping centers.
   C. The communication patterns between media and potential customers.
   D. The development of Self-Service, limited service and automation in merchandising.
   E. The increase in discretionary income hold by consumer.

VII. Limitations of Advertising
   A. Cannot sell unwanted products.
   B. Cannot sell poor merchandise, poor service or over priced products
   C. Must be used on a continuous.

ACTIVITIES

1. Have employed students give examples of advertising, sales promotions, and publicity used in their training stations.
2. Have students explain what methods their stores use in keeping personnel informed of advertising activities.
3. Have students give examples of specific promotional activities. which are obvious in the local community.
4. Have students classify various advertisements as to institutional or promotional.
5. Discuss the statement: "Many of the criticisms of advertising cannot be substantiated with valid evidence."
6. Using the local newspaper, have students determine the purposes for an advertisement concerning their training station.
7. Have a guest speaker from a newspaper speak on the importance of advertising to the newspaper, businesses and consumer.
8. Have a field trip to a newspaper to see how advertising and the news are related.
9. Allow extra credit for students to collect and make a scrapbook of magazine and newspaper advertisements which reflects the various purposes.
10. Case problem. (Attached) Can be used for discussion or a written review.

UNIT XII - SALES PROMOTION
Part 1 - Merchandising Through Advertising
Activity 10

Banking in the Future
Case Study
Subject Area: Sales Promotion and Advertising
Business: Bank

Name____________________
Date____________________

The first National Bank of Elmsville has been in operation for over 50 years. Almost everyone in the suburban community, or in fact, the entire surrounding area, has been a customer of the bank in some way at some time; the bank has just "grown along" with the community. Recently, newer communities have sprung up in the surrounding area and large shopping centers have begun to appear. One shopping center is located right at the north edge of Elmsville and another has put in its appearance near the southeast edge of town, about three miles from the Elmsville limits. Both of these new shopping centers have banks which are definitely customer oriented, offering many new modern services and conveniences.

For the first time in its history, the First National Bank of Elmsville realizes that it has been "standing still" for some years. Many new banking ideas, such as drive-in-windows, IBM Data Processing Equipment, have not been tried out by the First National. The officers of the bank are discovering that many new families in the area are opening checking and savings accounts at one of the new banks. Also, they are realizing that some of their oldest and best customers are beginning to go to the newer banks because of convenience.

Customers of the First National are accustomed to parking on the streets close to the bank but recently parking meters were installed in this area. The bank is located on a corner. Behind the bank, across an alley, there is a summertime hamburger and ice cream stand. This property would be available, if the bank were interested in it.

The First National wants to be competitive now and has hired you to manage the sales promotion and advertising. The officers are waiting for your new ideas.

Define the following terms:

Sales Promotion:

Advertising:

Publicity:

Customer Oriented:

UNIT XII - SALES PROMOTION
Part 1 - Merchandising Through Advertising
Activity 10

Define:

Sales Promotion:

Advertising:

Questions for Review:

1. In your opinion, does the bank now offer"complete banking service"? What services might be lacking and what would you do to improve this case.

2. What existing areas, or departments, of the bank can you promote or advertise?

3. What new conveniences might be added?

4. Would you recommend that the First National do anything about the lot in back of the bank building? How might the bank use it?

5. Are there any departments or functions of the bank that you would not wish to promote or advertise? What might they be and why would you not wish to promote or advertise them?

6. Assuming that the officers of the bank will go along with those expenditures you can justify, create a complete sales promotion and advertising campaign for the bank.

UNIT XII - SALES PROMOTION
Part 2 - Creating the Advertisement

Length: Open

Prerequisite: A general knowledge of the advertising process.

Description: A study of the components of an advertisement.

Objectives: At the completion of this lesson the student will be able to do the following:

1. The student will be able to identify the five components that make up an advertisement.
2. The student will be able to prepare an advertisement using the five components of advertising.
3. The student will identify and apply the effects of a good advertisement to the AIDA concept.

Sources:
Marketing, Sales Promotion and Advertising, by Nolan & Warmke, 7th Ed.,
Retail Merchandising, Wingate & Samson, 7th Ed., page 401-407.
Marketing and Distribution, Mason & Rath, page 387-392.
Advertising and Sales Promotion, Richert, Meyer & Haines, 5th Ed., page 360-376.
Advertising and Displaying Merchandise, H.E. Samson, page 23-35.
Advertising, W.H. Antrim, page 49-62.

OUTLINE

I. Components of an Advertisement
   A. Headlines
   B. Illustration--Emphasize color and color wheel.
   C. Copy
   D. White space
   E. Logotype
   F. Border
II. Effects of a Good Advertisement
   A. Gets favorable attention
   B. Creates interest
   C. Consumer's desire
   D. Stimulates consumer action
III. Copy Strategy--Test the power of your advertisement by knowing:
   A. Who they are--audience selection
   B. Where they are
   C. When to reach them

D. How to reach them
E. What to tell them

ACTIVITIES

1. Using railroad board size paper, allow students to create an advertisement for their training station or for the student store, using the five components of an advertisement.
2. Allow the student to explain his advertisement to the class using the AIDA formula and copy strategy.
3. Have students create an advertisement flier on a ditto to accompany their advertisement.
4. Have students prepare in writing a 30 second spot announcement to accompany their advertisement. (These are fun to read to the class.) Tape record! See samples, pages 46-47, Advertising & Display Merchandising, by South Western.
5. Invite a speaker from an advertising agency to demonstrate effective advertising techniques.
6. Bring to class various advertisements. Analyze these from time to time using the above outline, or use prepared slides from Ohio State University.
7. Have students select a product, and agree on answers to questions such as: Who will buy the item, Where the item will sell best, When to reach them, How to reach them and What to sell them.
8. A guest speaker may be invited to present career opportunities in advertising occupations.
9. Case problem (Attached).

UNIT XII - SALES PROMOTION
Part 2 - Creating the Advertisement
Activity 1 - Ad Layout

Rating Sheet

Name:______________________________ Class:________________________

Grade:__________ Date:______________________

Store:______________________________

Type of Store:______________________

Article Advertised:_________________

Factor	Possible Points	Judged Points
Neatness	5	
Originality of approach to complete ad	5	
Arrangement of copy and artwork (layout)	10	
Idea in headline	20	
Exact description of merchandise	10	
Use of selling points in copy	20	
Identification of item in artwork	5	
Signature cut	15	
Location of store	5	
Store hours or other information (layaway, charge)	5	
TOTAL POINTS	100	

UNIT XII - SALES PROMOTION
Part 2 - Creating the Advertisement
Activity 9

Case Study: "Should Spangler's Specialize?"
Subject Area: Sales Promotion

Spangler's is a small furniture store, located in the community of Maple Park, which has a population of 40,000 people. Up until now, Spangler's has carried a combination of provincial, contemporary, and Early American furniture. Because of the small store, a somewhat limited selection of each furniture style and related home furnishings accessories has been carried.

The community is growing. Business has been increasingly good, and prospects for continued prosperity are excellent. Spangler's would like to expand the business in some way, but Mark and June Spangler are not sure just how it should be done. At the present time there is no available store in a desirable location that Spangler's could lease. Besides, the present location is very advantageous. The store is right in the middle of the main shopping area on the main street, and they would not like giving it up.

Mark and June Spangler have considered other alternatives. They have been thinking perhaps it would be a wise thing to concentrate on one of the three styles of furniture and exclude the other two. For example, they could sell either contemporary furniture or provincial furniture exclusively. Then they could capitalize on being specialists in that one style of furniture by carrying the complete line.

They could also continue as they are and stay diversified, carrying a sample of each style of furniture. To overcome the disadvantage of having only a little bit of everything, they could lease a warehouse in the city. Here they could keep a good inventory of each style, and then take their customers to the warehouse when a greater selection was needed.

What would be the best procedure for Spangler's to follow?

ANSWER the following questions:

1. What are the advantages of carrying just the one line of furniture? The disadvantages?

2. Are there any advantages to carrying a selection of the various types of furniture? What are they? Are there any disadvantages? What are they?

3. Would the approach in the advertising and merchandising efforts be any different between the two alternatives? How would they differ?

4. What do you think of the proposal of renting a warehouse? Would it really answer the problem of limited store space? Why, or why not? Could the Spangler's use this idea in their advertising and sales promotion? How?

5. Suppose that Spanglers could find a good location to build a new store. Would you recommend this idea? Why? With a new store would you recommend they specialize in one line, or carry diversified lines? Why?

6. How could they finance such a building, especially if the furniture store has most of its assets in inventory?

7. What would you do if you were the Spanglers? Why?

8. On 16" X 20" paper, create an advertisement for the Spangler's Furniture store. You may wish to review what constitutes a good ad. You will be graded on originality and neatness.

UNIT XII - SALES PROMOTION
Part 3 - Advertising Media

Length: Open

Prerequisite: A general knowledge of the various media used in advertising. This could be a lecture by the teacher or a guest speaker.

Description: A study to introduce the student to the different medias used in advertising.

Objectives: Upon the completion of this unit, the student will be able to do the following:

1. Explain the different media and their use.
2. The student will be able to explain and demonstrate the importance of trademarks, slogans, and brand names.

Sources: Advertising and Displaying Merchandise, H.E. Samson, page 36-45.
Advertising, W.H. Antrim, 1970, page 19-33.
Marketing, Sales Promotion and Advertising, Nolan & Warmke, 7th Ed., page 409-485.
Fundamentals of Selling, Wingate-Nolan, 9th Ed., page 440-454.
Retail Merchandising, Wingate-Samson, 7th Ed., page 396-401.

OUTLINE

I. Advertising Media
   A. Printed Media
      1. Newspaper
      2. Magazines
      3. Direct Mail
   B. Broadcast Media
      1. Radio
      2. Television
   C. Position Media
      1. Outdoor Advertising
      2. Transportation Advertising
   D. Other Media
      1. Specialty Advertising -- calendars
   E. Sample of different Media, emphasizing strong and weak points of each, located on page 12, Advertising & Display Merchandise, South Western.
II. Trademarks, Slogans, and Brand Names
   A. Trademarks
      1. Define

2. Purpose
3. Elements of
4. Reason for
5. Value of
6. Registration of
7. Selection of

B. Brand Names
   1. Define
   2. Selecting a brand name
   3. Requirements of
   4. Classifications of

C. Slogans
   1. Define
   2. Value of
   3. Effectiveness of
   4. Registration of
   5. Labels

III. Cooperative Advertising

ACTIVITIES

1. The instructor will select several trademarks, brand names and slogans. Read and show to the class and where possible, have students identify each company, and state what product is manufactured, or service rendered. See attached example.
2. Students can cut out trademarks or slogans which have become associated with certain products. Matching a product with each slogan or trademark would be followed by discussion concerning why producers strive to maintain a certain image. See attached.
3. During the study of advertising, each student would keep a notebook illustrating samples of the various media used by their training station.
4. Ask the students to explain how their training station carries out its store image in its advertising policies. Most store's advertising will follow the same style and layout for month after month or even year after year. Why?
5. Develop a trademark, brand name and a slogan for a firm that does business under your name. Your plant is located in Washington and you package and distribute breakfast cereals.
6. Contest--Select 10 to 15 common everyday advertisements from several magazines. Cross out all printing that indicates who is responsible for the advertisement. Have students number on a sheet of paper 1 to 15. Starting with number one show the class and ask them to write down the product or who the manufacturer or company is responsible for the advertisement. After 15, the students with the most correct will be the winners.
7. Case problem on Advertising--Attached.
8. Samples of Calendar of Merchandising Dates -- Attached.

UNIT XII - SALES PROMOTION
Part 3 - Advertising Media
Activity 1

1. Select 25 Trademarks from your newspaper.

   A. Tape to sheet -- Identify trademarks with sponsor.

2. Select 10 "Slogans" from your newspaper.

   A. Tape to sheet -- Identify slogan with sponsor.

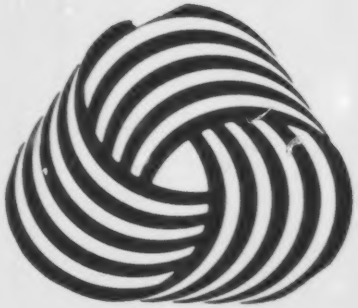
3. Find an ad that appeals to you, catches your attention.

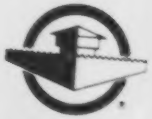
   A. Cut this ad out and tape it to a sheet.

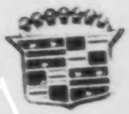
4. Find an ad that does not appeal to you.

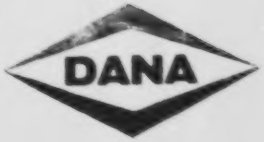
   A. Cut it out and tape it to a sheet of paper.

UNIT XII - SALES PROMOTION
Part 3 - Advertising Media
Activity 2

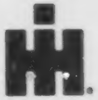

WORSTED-TEX

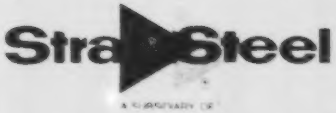

FORT-HOWARD
PAPER

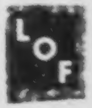

CADILLAC



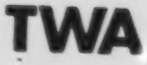
DANA CORPORATION


INTERNATIONAL
HARVEST
CO.

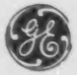

StranSteel
A SUBSIDIARY OF
STRAN-STEEL

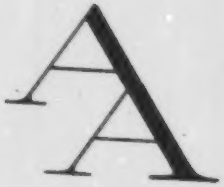


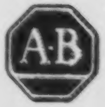
LIBBY OWENS
FORD



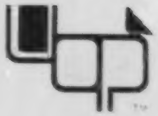
TRANS-WORLD
AIRLINES


GENERAL ELECTRIC


AMERICAN APPRAISAL



ALLEN-BRADLY


UNIVERSAL OIL PRODUCTS

VOLKSWAGON

TRADEMARKS

UNIT XII - SALES PROMOTION
Part 3 - Advertising Media
Activity 2

Never misses. Never quits.

VICEROY CIGARETTE

Man cannot live by
four-door sedans alone.

FORD

"WE DON'T WAIT FOR TOMORROW"

INTERNATIONAL
HARVEST

The Insiders Bourbon.

~~TRUE FOR TODAY'S MAN/NOVEMBER 19707~~ 15

MATTINGLY & MOORE

"THE GREATEST TIRE
NAME IN RACING"

FIRESTONE

If you had to compete with GM, Ford and Chrysler, what would you do?

AMERICAN MOTORS

SLOGANS

UNIT XII - SALES PROMOTION
Part 3 - Advertising Media
Activity 1

Examples of Effective Slogans

Millions of dollars are spent each year on slogans such as those listed below. How many do you recognize? The names of the products or the marketers using these slogans are given on the next page.

1. Progress is our most important product.
2. The most trusted name in television.
3. The world's finest powder.
4. Relief is just a swallow away.
5. You live better electrically.
6. They always eat better when you remember the soup.
7. For people who can't brush after every meal.
8. Acts twice as fast as aspirin.
9. Look, Mom, no cavities!
10. Telephone the folks you miss the most.
11. 99 and 44 100% pure.
12. Rolls on protection that stays on.
13. The world's most honored watch.
14. 57 varieties.
15. Better things for better living through chemistry.
16. Soap of beautiful women.
17. Strength of Gibraltar.
18. When it rains--it pours.
19. Hasn't scratched yet.
20. Breakfast of champions.

ANSWERS - to Activity 1.

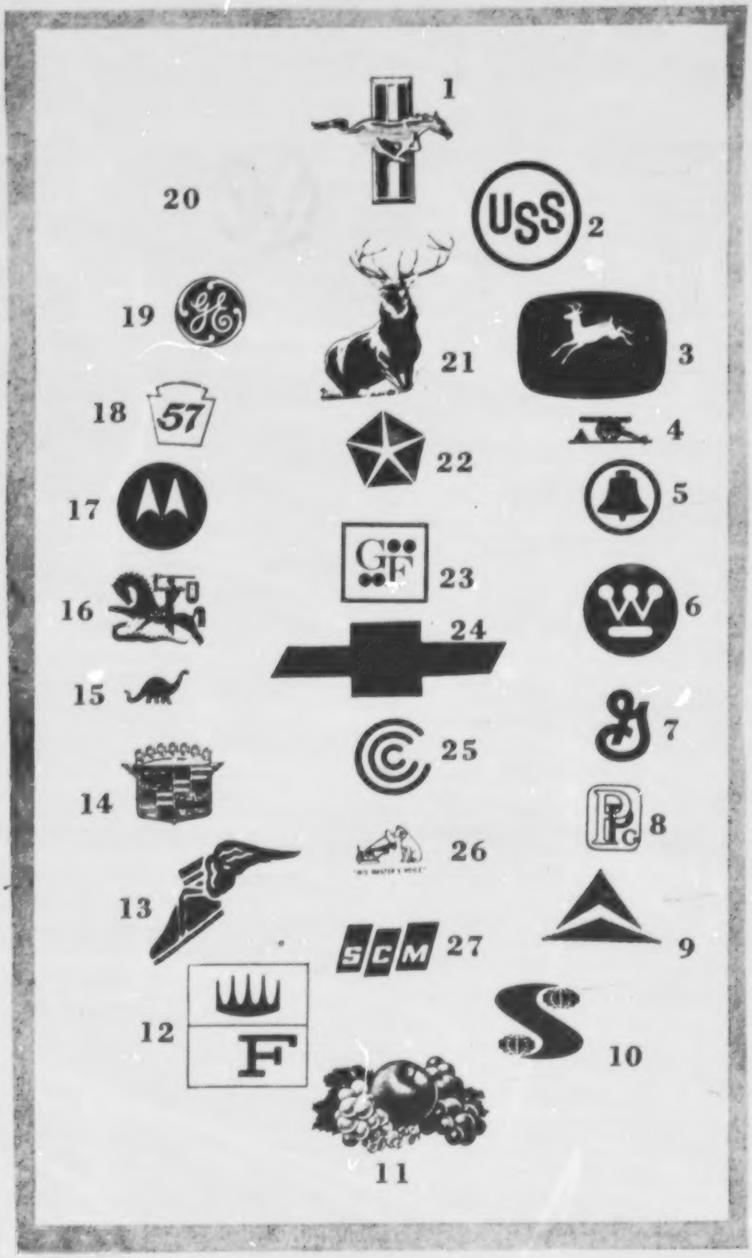
1. G.E.
2. Radio Corporation of America
3. Johnson and Johnson
4. Alka-Seltzer
5. Edison Electric Company
6. Campbell's
7. Gleem
8. Bufferin
9. Crest
10. Bell Telephone
11. Ivory Soap
12. Ban
13. Longiness
14. Heinz
15. Du Pont
16. Camay
17. Prudential Insurance
18. Morton Salt
19. Bon Ami
20. Wheaties

Page 332 of Marketing Sales Promotion and Advertising.

UNIT XII - SALES PROMOTION
Part 3 - Advertising Media
Activity 2

TEST YOUR ADVERTISING EYE

This illustration shows well-known trademarks. How many do you recognize? (Answers to each found on next page)


1
USS
2
20
19
GE
21
3
18
57
4
22
17
5
GF
23
16
6
24
15
7
25
14
8
26
13
9
SCM
27
12
F
10
11

ANSWERS - to Activity 2

1. Mustang
2. U.S. Steel
3. John Deer Farm Equipment
4. Cannon Towels
5. Bell Telephone
6. Westinghouse Electric
7. General Mills
8. Pittsburgh Plate Glass
9. Delta "Jets"
10. Shick Electric Shavers
11. Fruit of the Loom
12. Frigidaire
13. Goodyear Tire
14. Cadillac
15. Sinclair oil
16. Reynolds Aluminum
17. Motorola
18. Heinz
19. G.E.
20. V.W.
21. Hartford Insurance
22. Chrysler Corporation
23. General Foods
24. Chevrolet
25. Continental Can Company
26. Radio Corporations of America
27. Smith-Corona-Merchant

UNIT XII - SALES PROMOTION
Part 3 - Advertising Media
Activity 7

Case Study
Subject Area: Advertising

Name: ______________________

Date: ______________________

Bill Todd, and his wife Mary, operate a toy and hobby shop called "Todd's Toys and Trains." The Store is located on a busy side street, just off the main shopping area of Glenhill, a medium-sized community. Although the traffic of the main street bypasses the store, a number of cars do go by since a public off-street parking lot is located just beyond the store.

Almost everyone in the community has heard of "Todd's" and their merchandise is popular. The prices are competitive in such lines as games, dolls, and play equipment that are carried also by competing stores. About three-fourths of Todd's customers come from the immediate community, and the other one-fourth comes from other neighboring towns.

The Todds feel that their business has kept pace with other businesses in the area, but sales have not continued to increase in recent years as they had ten years ago. In fact, sales have leveled off now and the Todds are interested in finding new ways to increase their sales volume.

When they first opened their store, the Todds advertised inthe local paper, the Glenhill "Advocate", a weekly newspaper. They placed an ad in the paper on the average of every two or three weeks. They would place a display ad, usually two or three columns wide by six to ten inches long, costing between $25 to $40. The ads were primarily institutional in nature since the Todds felt that everyone knew what a toy and hobby shop sold. Occasionally they would advertise a clearance sale of items after Christmas, and in the early fall of outdoor items that they did not want to keep in stock for the next year. They felt justified in spending this money when the business was starting out, but after two years the Todds felt that an annual advertising budget of $600 was too much for a store the size of theirs. After this, ads were placed more infrequently. As time went on, the Todds became less and less sure that advertising was doing them any good. They even tried inserting coupon ads offering a special free gift or a discount when the coupon was presented by the customer. Even these ads proved to be ineffective and, eventually all advertising was dropped.

Now, the Todds are interested in doing something to increase sales. Again advertising seems to be the answer, but what kind? And how much? Also, where? There is only the one local paper, and the owners of that paper also own papers distributed in the nearby communities. A small radio station is located in one nearby community which serves about ten towns in a radius of about forty miles. Right now the Todds are mulling over what they should do.

Answer the following questions as thoroughly as possible.

1. Why are the Todds considering taking any action?

2. What events led the Todds to thinking about using advertising again?

3. What possibilities for advertising are available to them?

4. What would you recommend that the Todds do in the way of advertising? Why? Justify your proposals. Try to include at least four areas of advertising.

5. The Todds are considering employing some new part time help. They have a choice between a middle-aged woman and a teenage boy in the local D.E. program. If you were the Todds, who would you hire and why?

6. Briefly describe the types of advertising your business uses and decide whether the Todds could or should take advantage of any of the methods used in your store. Remember their budget is limited.

7. Do you know of any business in our area that would be classified like the Todd's store? If you do, briefly describe the store and state whether you think they do a good business and then describe why.

8. On a 16" X 20" paper, plan and prepare an advertisement for the Todd's Toy Shop. You will be graded on your originality and neatness. You may want to review what constitutes a good advertisement.

BUSINESS VOCABULARY: Define each term.

1. Advertising: ______________________________

____

2. Display ad: ______________________________

____

3. Institutional ad: ______________________________

____

4. Advertising budget: ______________________________

____

5. Coupon ad: ______________________________

____

6. Media: ______________________________

____

UNIT XII - SALES PROMOTION
Part 3 - Advertising Media
Activity 8 - Sample

CALENDAR OF MERCHANDISING DATES

Date	Event	Colors	Emblems
January 1	New Year's	Apple green and white	Father Time,baby,hourglas
February 12	Lincoln's Birthday	Red, white and blue	Shields, flage, portraits
February 14	Valentine's Day	Red and white	Hearts,cupids,arrows.
February 22	Washington's Birthday	Red, white and blue	Pageants,cherries,hatchet
March 17	St. Patrick's Day	Green	Irish flag,shamrocks,Irish emble
March 21	First day of Spring	Coral, apple green	Birds,flowers,butterflies
Date varies	Easter	Violet and white Purple and white	Chickens,rabbits,flowers, birds, butterflies
April 1	April Fool's Day	Yellow and red Yellow and blue	Jesters,fool's caps,bells
April 26	Confederate Memorial Day	Red, white and blue	Wreaths, flowers
May 1	May Day	Any pastel shades	May baskets, Maypole
Date varies	Mother's Day	Red and white	Carnations
May 30	Memorial Day	Red, white and blue	Flags, wreaths
June	Bridal Season	White and Nile green	Bells,rings,confetti,bride
Date varies	Father's Day	Any strong, bright colors	Picture of Father
June 14	Flag Day	Red, white and blue	Flags
June 21	First day of Summer	Any pastel rainbow shade	Birds,flowers,butterfl
June	Graduation	School or college	Diploma,cap and gown,owls,boo
July 4	Independence Day	Red, white and blue	Flags,shields,firecracke
July	Vacation	Cool pastel shades	Baggage,seashore,beach scene
First Monday in September	Labor Day	Red, white and blue	Various artisan's tools
September	School opening	School colors or fall colors	Blackboard,slate,books
September 21	Autumn	Reds, browns, yellows	Autumn leaves,chrysanthemums,
October 12	Columbus Day	Red, white, blue-- combined,if desired, with green, red and white(Italian colors.)	Ships
October 31	Halloween	Orange, black	Witches,cats,bats,owls,
November 11	Veteran's Day	Red, white and blue	Flags of Allies,poppies
Last Thurday in November	Thanksgiving	Red, burnt russet, orange, light orange	Turkeys,horn of plenty
December 21	First day of Winter	White	Icicles,snow-covered
December 25	Christmas Day	Red and green	Santa Claus,holly,bell

UNIT XII - SALES PROMOTION
Part 3 - Advertising Media
Activity 8 - Sample

Month	Climatic	Calendar	Traditional
January	Clearance of winter merchandise Resort Wear	Inventory Clearance	White goods sales Drug sales.
February	Advance showing of spring merchandise	Lincoln's Birthday Washington's Birthday Valentine's Day Boy Scout Week Lent*	Furnitire Piece Goods Housewares
March	Spring clothes	Girl Scout Week Easter gifts* St. Patrick's Day	Home furnishings*
April	Spring cleaning supplies, Garden supplies and outdoor furniture	Opening of baseball season Do-it-Yourself Week Baby Week	Spring anniversary sales
May	Spring clearance Summer sportswear Air conditioners	Mother's Day Camp wear	Bridal promotions
June	Summer wear	Graduation gifts Father's Day Vacation needs Barbecue needs	Housewares sales Drug sales
July	Summer clearance	Fourth of July Inventory clearance	
August	Advance showing of fall merchandise	Back-to-school needs	Furniture* Piece goods Fur sale Housewares*
September	Fall clothes	Christmas layaway promotion Back-to-school	China and glass Draperies and curtains
October	Fall clothes and accessories	Columbus Day Halloween	Fall anniversary sale* Woolen piece goods
November	Fall clothes and accessories	Election Day Thanksgiving Christmas gifts	Linens, china, glass
December	Winter clothes Resort wear	Christmas gifts Evening wear	

*Subject to variations

UNIT XII - SALES PROMOTION
Part 4 - Planning the Advertising Campaign

Length: Open

Prerequisite: A general knowledge of the importance of the Advertising campaign, budget and the control of advertising.

Description: A study of the advertising campaign, budget, and the control of advertising.

Objectives: At the completion of this lesson, the student will be able to:

1. The student will be able to, using his training station, establish goals and plan in writing a promotional calendar for one year period of time.
2. The student will be able to identify the agencies that have control over advertising.

Sources:
Advertising and Displaying Merchandise, H.E. Samson, page 15-25.
Marketing, Sales Promotion and Advertising, Nolan & Warmke, 7th Ed., page 222-232, 507-536.
Advertising, Wright & Warmer, 2nd Ed., page 466-476, 562-572.
Retail Merchandising, Wingate & Samson, 7th Ed., page 408-414.

OUTLINE

I. Planning An Advertising Program.
  A. What to Advertise
    1. Advertise best sellers
    2. Advertise to meet customers interest
  B. Where to Advertise
    1. Types of Medias used
    2. Media check list (Strong Points-Weak Points)
  C. When to Advertise
    1. Checking Sales Records
    2. How often to advertise.
II. Advertising Budget
  A. No plan at all
  B. By Shopping events
  C. According to last year's sales
  D. In terms of anticipated sales
  E. By the objective and task method
III. Advertising Campaign
  A. Choosing the media
  B. Plan for budgeting
  C. Check Advertising research

IV. Promotional Events
    A. Clearance Sales
    B. Store Opening
    C. Anniversaries
    D. Modernization
    E. Special monthly promotional events
V. Control of Advertising
    A. The Associated Advertising Clubs of America
    B. A.A.A.A. The American Association of Advertising Agencies
    C. Better Business Bureau
    D. Federal Trade Commission
    E. Federal Communication Commission
VI. Future of Advertising
    A. The future of Advertising as an Economic Force
    B. The future of Advertising as a Social Institution
    C. The future of Advertising as an Art of Communication.
    D. The future of Advertising as an in World Trade.
    E. Carreers in Advertising.

ACTIVITIES

1. Guest speaker from the Better Business Bureau discussing the bureaus' function, how financed, membership elegibility and activities.
2. Develop a sales promotion plan, or calendar, showing all important days, weeks, seasons, local celebrations and state and national events. Prepare this for your training station starting with January (See attached sample)
3. Student should discuss and explain activity number two, orally to the class.
4. Develop an advertising budget, starting from the annual estimated gross sales and a predetermined per-cent of gross sales for advertising expense. Include monthly dollar allowance, the merchandise departments to be featured, and the media to be used, etc.
5. The entire class could review the advertising campaign - presented in chapter 21, part 2 of Marketing, Sales Promotion and Advertising by Nolan and Warmke. The campaign depicts the step-by-step process that is necessary to organize an effective sales-promotion campaign.
6. Discuss the agencies that have controls over advertising, the future of advertising and Careers in advertising.
7. Discuss the Ten Most Common Consumer Deceptions. Attached.

UNIT XII - SALES PROMOTION
Part 4 - Planning the Advertising Campaign
Activity 1

1. Prepare "PROMOTIONAL CALENDAR" (one year)
    A. Nine different promotions, (your choice)
    B. Dates of each on calendar.
    C. Theme
    D. What merchandise is to be featured.
    E. Type of advertising to be used. (Radio, television, newspaper, etc.)
    F. The dates the ad will be run.
    G. If additional help will need to be hired?

(Sample Attached)

UNIT XII - SALES PROMOTIONS
Part 4 - Planning the Advertising Campaign
Activity 1

NEW YEARS CLEARANCE

MERCHANDISE

Mens double breasted suits
Womens sweaters, slacks
Womens - Mens ski apparel

ADVERTISING

Run ad in newspaper one week prior to sale. $17.35.

ADDITIONAL HELP

Hire two checkers $2.35 hour
One stock-boy $1.75 hour

NEW YEARS

CLEARANCE

19__

JANUARY

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1) ▨	2) ▨
3)	4) ▨	5) ▨	6) ▨	7)	8)	9)
10)	11)	12)	13)	14)	15)	16)
17)	18)	19)	20)	21)	22)	23)
24)	25)	26)	27)	28)	29)	30)
31)						

UNIT XII - SALES PROMOTION
Part 4 - Planning the Advertising Campaign
Activity 1

ST. VALENTINES DAY SALE

MERCHANDISE

Candy
Cologne, mens
Nylons
Cosmetics
Cards

ADVERTISING

Radio - 3 days before sale
Newspaper - starting Sunday before sale.

ADDITIONAL HELP

None required

ST. VALENTINES DAY SALE

19__

FEBRUARY

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1)	2)	3)	4)	5)	6)	7)
8)	9)	10)	11) ▨	12) ▨	13) ▨	14)
15)	16)	17)	18)	19)	20)	21)
22)	23)	24)	25)	26)	27)	28)

UNIT XII - SALES PROMOTION
Part 4 - Planning the Advertising Campaign
Activity 7

TEN MOST COMMON CONSUMER DECEPTIONS

No. 1 "Bait and Switch" Advertising: Insincere offers of attractive products or services to obtain leads that will be switched to higher priced products more advantageous to the sellers.

No. 2 Home Improvement Swindles: Hidden trust deeds executed without knowledge or consent of homeowners' phony bargains, tricky financing, guarantees not honored, materials misrepresented and performances exaggerated. Losses estimated at $500 million a year.

No. 3 Chain Referral Swindle: "Free" merchandise because of subsequent credits or bonuses paid for sales made to friends who purchase because of the buyer's referral.

No. 4 Charity Swindles: Of the $10 billion that generous Americans contribute to charity every year, about 1 per cent get siphoned off by dishonest fund raising and other abuses, amounting to about $100 million annually.

No. 5 Phony Credit Certificates: Phony contests and prizes awarded upon condition of purchasing another related product over-priced to offset the cost of the "prize".

No. 6 Business Opportunity Schemes: Franchise opportunities designed so that the promoter makes his profit from the investor regardless of whether the opportunity is worthless or the investor realizes any return.

No. 7 Debt Consolidation Gouging: There is no way of consolidating debts without incurring more debt. So-called brokers' fees, "placement" fees, appraisal, photographs, searches, recording fees, etc.

No. 8 Victimizing the Aged: Appeals made to the insecurity, dwindling mental alertness and loneliness of the aged, to separate them from their life savings, retirement and insurance incomes.

No. 9 Health Quackery: Reducing pills, bust developers, hair restorers, "virility pills," cancer and arthritis cures--well over a billion dollars annually.

No. 10 Work At Home Gyps: Gimmick ads to sell overpriced and shoddy equipment that fails to earn the income represented.

UNIT XII - SALES PROMOTION

Part 5 - Merchandising through Display

Length: Open

Prerequisite: A general knowledge of the importance of sales promotion.

Description: A study of the importance and purposes of display.

Objective: At the completion of this lesson the student will be able to do the following:

1. The student will be able to explain the importance of advertising and display.
2. The student will be able to list in writing the purpose of display.

Sources:
Display and Promotion, Smith, 1970, page 1-14.
Retailing, Richert, 1968, page 300-308.
Retail Merchandising, Wingate-Samson, 1968, page 416-420.
Fundamentals of Selling, Wingate-Nolan, 1969, page 490-496.
Advertising and Displaying Merchandise, Samson, 1967, page 50-64.
Obtain Windon Display - 40-35mm slides from Ohio State University, D.E. Materials Lab, 124 West 17th Ave., Columbus Ohio 43210 Price $10.00

OUTLINE

- I. Importance And Purposes of Display
  - A. Meaning of display--definition
  - B. Purpose of display
  - C. Relationship to advertising
- II. Job Opportunities in Display
  - A. Types of jobs
  - B. Qualifications

ACTIVITIES

1. Obtain a camera and take several photos of displays to be used in parts 6 and 7.
2. Interview a display manager of a retail department store. Ask questions about duties and job opportunities.
3. Have students conduct a window display study. A suggested form for this use is attached.

UNIT XII - SALES PROMOTION
Part 5 - Merchandising through Display
Activity 3

Name ______________________________

Date Assigned ______________________________

Estimated Finish ______________________________

Date Finished ______________________________

Evaluation ______________________________

WINDOW DISPLAY STUDY

A window display is supposed to attract attention, arouse interest, create desire, build confidence, and stimulate the viewer to enter the store and take action. A way of discovering a display's ability to do the above is to actually watch the passerby's reaction to the display. What does he look at? Does he stop? Does he go into the store after looking at the display? These are questions which can be asked in evaluating a window's effectiveness. A count of the total number of people passing the window display and the percentage of this total who look, stop, and then enter the store provide quantitative measures.

In this project you are to study the traffic flow past three specific window displays for the purpose of evaluating the display's power of attraction, its ability to creat interest, and as much as possible. its ability to create desire and induce action. Each window display should be observed for a period of 20 minutes. Station yourself so that an accurate count can be made. On each of the following window display study sheets, record the required information. The display description should mention merchandise, theme, lighting, background, color, floor, use of motion, type of arrangements, and use of price, show cards, props, and any other components. After your observation calculate the percentages called for and answer the questions on the sheet.

When you have completed all three window display study sheets, answer the following questions regarding your observations.

1. What effect does the time of day have on the traffic flow and the display viewers? ______________________________

____

____

____

2. Why should the display man know the type of people who pass by the display window? ______________________________

UNIT XII - SALES PROMOTION
Part 5 - Merchandising through Display
Activity 4

WINDOW DISPLAY STUDY SHEET

Name of store ______________________________ Address ____________________________________

Window display observed _________________________ Numbers of windows in store ________

Date of observation ____________________________ From _____________ to ______________

Description of display ____

____

____

____

____

TRAFFIC COUNT	Women	Men	Total	% of Traffic
Number of people passing by display on sidewalk				
Number of people looking at display while passing by				
Number of people stopping to look at display				
Number of people entering store after looking at display				

1. What causes most viewers to stop and look?
   Women ____
   Men ____

2. Which item or part of the display seems particularly effective?
   ____

3. What do you feel could be changed or improved to make the display more effective?
   ____
   ____
   ____

UNIT XII - SALES PROMOTION
Part 6 - Display Concepts

Length: Open

Prerequisite: A general knowledge of the importance and purpose of displays.

Description: A study of basic display concepts, designs and principles.

Objectives: At the completion of this lesson the student will be able to do the following:

1. The student will be able to develop a display layout using correct principles of display and design.
2. Illustrate the basic elements of design.
3. The student will be able to distinguish between formal and informal balance.
4. The student will be able to describe the use of colors in display.

Sources:
Display and Promotion, Smith, 1970, page 29-82.
Advertising and Displaying Merchandise, Samson, 1967, page 50-64.
Retailing, Richert, 1968, page 309-339.
Retail Merchandising, Wingate, 1968, page 432-448.

OUTLINE

I. Steps in Selling Through Display
   A. Attract Attention
   B. Arouse interest
   C. Create desire
   D. Build Confidence
   E. Direct action
II. Basic Principles of Designing Displays
   A. Elements of design
      1. Line and direction
      2. Shape
      3. Size
      4. Texture
      5. Weight
      6. Color
   B. Principles of Design (Illustrate)
      1. Repetition
      2. Harmony
      3. Contrast
      4. Emphasis

        5. Balance, formal and informal
        6. Proportion
- III. Color and Lighting In Displays
    - A. Hue
    - B. Intensity
    - C. Value
    - D. Color wheel
        1. Primary colors
        2. Tertiary colors
        3. Complementary colors
        4. Complementary
        5. Analogous (adjacent)
- IV. Motion in Displays
    - A. Starts with an idea (theme)
        1. Merchandise to display
        2. How
        3. When
        4. Benefits
    - B. Purpose
    - C. Use a single theme
    - D. Make a sketch
    - E. Merchandise
    - F. Background fixtures
    - G. Signs, show cards, price tags, etc.

ACTIVITIES

1. Obtain samples of signs, showcards, etc., from training stations and stores.
2. Have students sketch a display which uses step, zigzag, and repetition arrangements. Use objects that are easy to draw such as cans, boxes, or cartons.
3. Have students create a color wheel.
4. Have students prepare an interior display, at school or training station, using merchandise from the training station or of their choice.
5. Have students make sign layouts.

UNIT XII - SALES PROMOTION
Part 7 - Types of Display

Length: Open

Prerequisite: Completion of parts 5 and 6. An understanding of display principles and design. A knowledge of how to plan a display.

Description: An action lesson in identifying, constructing and evaluating displays.

Objectives: At the completion of this lesson the student will be able to do the following:

1. Identify the various types of window displays.
2. Select the type of interior display most appropriate for given types of merchandise.
3. Prepare a plan, select materials, secure merchandise and construct a display.
4. Evaluate an assigned display, using a rating sheet as a guide.

Sources:
Display and Promotion, Smith, 1970, page 29-82.
Advertising and Displaying Merchandise, Samson, 1967, page 65-95.
Retailing, Richert, 1968, page 300-308, 324-339.
Retail Merchandise, Wingate-Samson, 1968, page 420-432.

OUTLINE

I. Type of Displays
   A. Promotional display
   B. Institutional display
   C. Window display
      1. Seasonal
      2. Related Merchandise
      3. One-item
   D. Interior displays
      1. Assortment
      2. Impulse
      3. Point of purchase
      4. Fashion
   E. Changing displays
   F. Coordinating displays with advertisement
II. Interior Spaces
   A. Counters
   B. Open areas
   C. Closed cases

    - D. Walls
    - E. Shelves
    - F. Buildings
    - G. Hangers
    - H. Shadow boxes
- III. Location of Displays
    - A. Interior
    - B. Outside

ACTIVITIES

1. Take the class on a tour of three different types of retail stores and complete the following summary:
    - a. What type of window display is used?
    - b. What type of interior displays are used?
    - c. Were the window and interior displays coordinated? If so, how?
    - d. Was one central theme or color scheme used? If so, what?
    - e. What could be changed or improved to make the displays more effective?
2. Arrange for a guest speaker on Display.
3. Window observation rating sheets enclosed.

UNIT XII - SALES PROMOTION
Part 7 - Types of Display
Activity 3

Name____________________

Date____________________

DISPLAY RATING SHEET

Name of store______________________Address__________________________

Description of display____

____

____

____

Power to Attract Attention

Is the theme or idea unique?
Is the background appropriate?
Is the base or floor appropriate?
Are display props suitable and attractive?

____
0 5 10 15 20

Arrangement

Is related merchandise used?
Is there a proper amount of merchandise?
Does the window reflect the store's character?
Is there evidence of the use of design principles?

____
0 5 10 15 20

Selling Power

Are merchandise features clearly shown?
Is attention focused clearly on the merchandise?
Is the merchandise displayed as it would be used?
Does the theme aid the features of the merchandise?

____
0 5 10 15 20

Timeliness

Is the merchandise well chosen?
Are show cards, tickets, and other messages related to the theme?
Are the colors appropriate to season and merchandise?

____
0 5 10 15 20

Lighting

Is the lighting in good taste and not garish? Is the lighting equipment adequate for the window? Does the lighting focus attention on the merchandise? Does the lighting enhance the colors used in the display?	0 5 10 15 20

Craftsmanship

Have the components been placed together neatly and without noticeable mechanical fastening? Are all parts of the display clean and in good repair? Is the major merchandise unit supplemented by minor units?	0 5 10 15 20

TOTAL OVERALL RATING FOR WINDOW DISPLAY

UNIT XII - SALES PROMOTION
Part 7 - Types of Display
Activity 3 - Window Observation Sheet

Name____________________________

Window Observed____
(Firm name) (Merchandise or Theme)

Date of Observation__________________________Time of Day__________________________

No. of persons passing display from _______to___________(15 minute period)

No. of persons stopping during this period_________________

****

PART I (To be used with first formal observation of display windows)

How did the display secure attention?

How did the display arouse interest?

How did the display create desire?

How did the display select the proper audience?

****

PART II (To be used, with Part 1 above, in subsequent formal observations)

Type of Display	Type of Goods Displayed
Single article	____________________
Manufacturer's line	____________________
Related articles	____________________
Material or Production process	____________________
Seasonal, Community and special events	____________________

Props Used

______Structural
______Decorative
______Symbolic
Describe:__________________________
____

Background

______Permanent
______Semi-permanent
______Temporary
Describe:__________________________________
____

Lighting
______Spot light
______Flood Light
______Colored light
Describe:____________________________
____

Purpose of Display
______Promotional
______Institutional

Showcards Yes____ No____

UNIT XIII

CAREERS IN MARKETING

Part 1 Survey Of Distributive Occupations

2 Using Career Information Materials

3 Determining Job Aptitude

4 Career Opportunities Project

AN ABSTRACT
OF A TWENTY-ONE PAGE DOCUMENT IDENTIFYING OCCUPATIONS IN THE FIELD OF DISTRIBUTION WITH CONTINUED SHORTAGES IN SKILLED WORKERS

(For full report, contact the State DE Office, K. Otto Logan, Program Director)

...One out of every four persons is employed in marketing of goods and services at both management and non-management levels.

...The occupational areas are as follows, listed alphabetically using USOE 1969 Code, 04.00 series.

ADVERTISING SALES
APPAREL AND ACCESSORIES
AUTOMOTIVE SALES
FINANCE AND CREDIT
FLORISTRY
FOOD DISTRIBUTION
FOOD SERVICES
GENERAL MERCHANDISE
HARDWARE AND FARM SUPPLIES
HOME FURNISHINGS
HOTEL AND LODGING
INDUSTRIAL MARKETING
INSURANCE
INTERNATIONAL TRADE
PERSONAL SERVICES
PETROLEUM
REAL ESTATE
RECREATION AND TOURISM
TRANSPORTATION
RETAIL TRADE, OTHER
WHOLESALE TRADE, OTHER
DISTRIBUTIVE EDUCATION, OTHER

...The DE Office Staff has taken the above occupations and classified them into six cluster areas for training purposes.

FINANCIAL SERVICE OCCUPATIONS
RETAIL OCCUPATIONS
SALES OCCUPATIONS
SALES-SUPPORTING OCCUPATIONS
SERVICE OCCUPATIONS
WHOLESALE OCCUPATIONS

In each cluster the specific occupations have been described and trends for the future have been projected. (It is hoped that this will be helpful to community college, secondary and post-secondary directors and supervisors in assessing local district needs and will assist them in developing educational programs to serve their local needs.)

Listed below are some significant statistics and samples of projected employment needs.

...Of all employment in distributive occupations, 11.2% is in the financial service occupational cluster. (Banking, Credit, Real Estate, Insurance)

...Of all employment in distributive occupations, 43.1% is in the retail cluster.

...The three highest ranking areas within this cluster category are general merchandise, food distribution and service stations.

...85% of the cashier-checkers are in the foods industry.

...Nationwide, 100,000 to 150,000 checkers are needed annually.

...1,000 new supermarkets will open each year for the next decade. This will create 130,000 to 160,000 additional in-store managerial positions.

...Under sales occupations, there will be a need for 3,149 routemen. the present output from all sources -- 40.

...Under sales supporting occupations such as transportation, 50% of the employees are women.

...In Washington, railroads employee 18,500

...Motor cars (Private Company - Sears, Safeway, etc.), employee 200,000.

...For Hire (Such as Northern Pacific Transport, Consolidated Freight, Garret, ONC) employ 60,000.

...Steamship - Port of Seattle alone - 30,000 employees.

...Airlines - 10,000 employees.

ACROSS THE BOARD SUMMARY OF EMERGING AND CONTINUING OCCUPATIONAL SHORTAGES IN DISTRIBUTION

A. Middle-Management--Supervisory, Department Heads, and Junior Executives positions are the emerging occupations cutting across all six of the cluster occupations defined earlier in this document.

...Current employment - 54,814
...Number needed to fill present jobs - 1,814
...Expected openings in 1974 - 4,282
...Present output from all avenues - 1,147

B. Specialized Sales positions requiring technical knowledge in such areas as Food Marketing and Wholesaling, Financial Service and Sales-Supporting occupations.

...Current employment - 13,907
...Number needed to fill present jobs - 797
...Expected openings in 1974 - 3,032
...Present output from all avenues - 197

C. Entry into many of the occupations listed in this report may be partially met by expansion of the high school distributive program but middle management junior executive positions and technical knowledge in specialized positions must be the community college and vocational-technical institutes' area of concentration and contribution.

D. Part-time cooperative programs developed by the school and the allied business association are an essential ingredient for success.*

bam
2/10/70

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*Charles E. Peck, January 1968 Survey to determine appropriate occupational programs in the field of Distribution and Marketing, p. 140, Volume I, University of Washington.

VOCATIONAL NEEDS IN DISTRIBUTIVE EDUCATION

A document identifying occupations in the field of distribution with continued shortages in skilled workers

I. Definition:

Distributive occupations are those occupations followed by persons engaged primarily in the marketing or merchandising of goods and services, at both management and non-management levels.*

II. Scope:

. The year, 1953, marked the first time in any country where employment in distribution exceeded employment in production.**

. Today, 1969, out of every ten persons making up the national labor force, six are employed in the field of distribution, or 60%.

. One out of every four persons is employed in a distributive occupation, or 25%.

. In analyzing the statistics furnished by the State Employment Security Department, the State of Washington figures parrellel those of the above national statistics.***

III. The U. S. Office of Education code and its 1969 description of occupational areas in alphabetical order.****

04.01 ADVERTISING SERVICES: Organized subject matter and learning experiences related to planning, development, placement, and evaluation tasks performed by distributive employees and management personnel in demand creation and sales promotion activities utilizing displays, merchandising aids, and mass media in such enterprises as advertising agencies, display houses, retail and wholesale establishments, and production industries.

04.02 APPAREL AND ACCESSORIES: Organized subject matter and learning experiences related to the variety of sales, fashion coordination, and sales-supporting tasks performed by distributive employees and management personnel in retail and wholesale establishments primarily engaged in selling clothing of all kinds, including related articles for personal wear and adornment.

04.03 AUTOMOTIVE: Organized subject matter and learning experiences related to the variety of sales and sales-supporting tasks performed by distributive employees and management personnel in retail, wholesale, and service establishments engaged in selling, renting, storing or caring of cars and trucks, and in selling automotive parts, accessories and equipment.

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*Lucy Crawford, Nationwide Research Study, in which it was determined that this is the most acceptable definition by the DE people - 1967.

**Walter Hoving, Economist at Harvard and Chairman of Tiffany & Co., New York, Lectures on the Distributive Revolution.

***Dennis Coplen (October 1969). Study on file in the State Office of DE.

****Vocational Education and Occupations, U.S. Office of Health, Education, and Welfare, July 1969.

04.04 FINANCE AND CREDIT: Organized subject matter and learning experiences related to the tasks performed by distributive employees and management personnel in institutions engaged in deposit banking and related services, extending credit in the form of loans, services allied with the exchange of securities and commodities, or consumer credit and collections.

04.05 FLORISTRY: Organized subject matter and learning experiences related to a variety of sales and sales-supporting tasks performed by distributive employees and management personnel in retail and wholesale establishments engaged in selling floral arrangements, cut flowers, growing plants, artificial plants, and related items for ornamental use.

04.06 FOOD DISTRIBUTION: Organized subject matter and learning experiences relating to a variety of sales and sales-supporting tasks performed by distributive employees and management personnel in establishments primarily engaged in selling food for home preparation and consumption, or selling a general or commodity line of food products at wholesale.

04.07 FOOD SERVICES: Organized subject matter and learning experiences related to the sales and sales-supporting tasks performed by distributive employees and management personnel in establishments serving prepared foods and drinks for consumption on their own premises or at a place designated by the customer.

04.08 GENERAL MERCHANDISE: Organized subject matter and learning experiences related to a variety of sales and sales-supporting tasks performed by distributive employees and management personnel engaged primarily in selling various types of merchandise at retail in department stores, junior department stores, variety stores, general merchandise stores, discount stores, and catalog houses.

04.09 HARDWARE, BUILDING MATERIALS, FARM AND GARDEN SUPPLIES AND EQUIPMENT: Organized subject matter and learning experiences related to various sales and sales-supporting tasks performed by distributive employees and management personnel in establishments engaged primarily in selling one or more of the following product lines at retail, at wholesale, or to contractors: hardware, paint, wallpaper, lumber, building materials, supplies and equipment for home construction, or farm and garden supplies and equipment.

04.10 HOME FURNISHINGS: Organized subject matter and learning experiences related to various sales and sales-supporting tasks performed by distributive employees and management personnel in retail and wholesale establishments engaged primarily in selling home furnishings such as furniture, household appliances, floor coverings, draperies, and specialized lines of home items.

04.11 HOTEL AND LODGING: Organized subject matter and learning experiences related to the tasks performed by distributive employees and management personnel in establishments which provide lodging, lodging and meals, convention facilities, and other services on a year-round or seasonal basis to the general public or to an organization's membership.

04.12 INDUSTRIAL MARKETING: Organized subject matter and learning experiences related to the tasks performed by sales and management personnel in establishing market potentials and selling goods and services to business and institutional buyers for use in their operations.

04.13 INSURANCE: Organized subject matter and learning experiences related to the tasks performed by sales and management personnel for insurance carriers of all types, or by agents representing carriers and brokers dealing in the sale or placement of insurance contracts with carriers.

04.14 INTERNATIONAL TRADE: Organized subject matter and learning experiences related to the tasks performed by distributive employees and management personnel in a variety of business establishments concerned with export sales, trade controls, foreign operations, attitudes, monetary problems, and other elements in international marketing.

04.15 PERSONAL SERVICES: Organized subject matter and learning experiences related to the tasks performed by sales and management personnel in establishments primarily engaged in providing services. Generally, these services are concerned with personal improvement and the care of a person or his apparel. Included in this category are laundries and dry cleaning establishments, shoe repair shops, funeral homes, photographic studios, and dance or art studios.

04.16 PETROLEUM: Organized subject matter and learning experiences related to the variety of sales and sales-supporting tasks performed by distributive employees and management personnel in retail or wholesale establishments engaged in the distribution of petroleum products.

04.17 REAL ESTATE: Organized subject matter and learning experiences related to tasks performed by persons who act for themselves or as agents for others in real estate brokerages or other firms engaged in buying, selling, appraising, renting, managing, and leasing of real property.

04.18 RECREATION AND TOURISM: Organized subject matter and learning experiences related to the variety of sales, counseling, and sales-supporting tasks performed by distributive employees and management personnel in establishments primarily engaged in providing amusement, recreation, entertainment, recreational supplies and equipment, or travel services. This instructional program is also designed for employees and management personnel engaged in other travel serving businesses who assume responsibilities for stimulating the local economy through tourism.

04.19 TRANSPORTATION: Organized subject matter and learning experiences related to the physical movement of people, personal effects and products, and the sales, storing, and sales-supporting tasks performed by distributive employees and management personnel in enterprises engaged in passenger and freight transportation, public warehouses, and services incidental to transportation.

04.20 RETAIL TRADE, OTHER: Include here other organized instructional programs and learning experiences, emphasized in sales and sales-supporting tasks performed by distributive employees and management personnel in establishments engaged in selling merchandise purchased for resale to customers for personal, household, business or farm use, which are not listed above. (Specify)

04.31 WHOLESALE TRADE, OTHER: Include here other instructional programs and learning experiences emphasized in sales and sales-supporting tasks performed by distributive employees and management personnel in places of business engaged primarily in selling goods to retailers, industrial, commercial, institutional and professional users, or bringing buyer and seller together, which are not listed above. (Specify)

04.99 DISTRIBUTIVE EDUCATION, OTHER: Include here other organized instructional programs and learning experiences, emphasized in marketing functions performed by employees, managers and/or proprietors in establishments engaged in selling products or providing services to individuals and business establishments, which are not classifiable as either retail or wholesale in nature and function. (Specify)

IV. The Distributive Education office personnel has taken the above occupations and classified them into six cluster areas as follows:

A. Financial Service Occupations
B. Retail Occupations
C. Sales Occupations
D. Sales-Supporting Occupations
E. Service Occupations
F. Wholesale Occupations

Specific occupations under each of the above six cluster occupations will be described showing trends, employment and training needs, opportunities, working conditions, places of employment and other pertinent information in tune with the times. At the end a summary will be made identifying the emerging and growing occupations in the field of distribution.

It is hoped that this will be helpful to community college and vocational-technical directors and administrators in assessing local district occupational needs and assist them in developing educational programs to serve their local needs.

V. Breakdown of the six major areas by types of occupation:

A. The occupations listed under Financial Service Occupations are: Banking and Finance, Credit, Insurance, Real Estate.

(1) Banking and Finance consists of such types of employment as: Account Executives, Branch Manager, Loan Desk Manager, Personnel Manager, Securities Salesman, Cashier, Collection Man, Credit Analyst, Teller, Treasurer, and Trust Officer. Employment is found in such places as Credit Union, Commercial Banks, Mutual Savings Banks, Personal Credit Institutions, Savings and Loan Associations, and Securities Exchange.

(a) Description: A bank officer makes decisions within the policy set by the Board of Directors. He must have a broad knowledge of business conditions and be able to relate them to the operations of his department. In the securities investment field, the sales person needs to know how to use resource materials, statistical and financial reports, general business conditions, specific industrial trends and the outlook of individual securities. He must have practical knowledge of laws on income tax and estate and trusts.

Distributive Education cooperates with the American Institute of Banking. Intensive inservice training for bank employees with notable results in this area are shown in Hillsboro Counties' two-year Community College, Florida, where for 1969-70 classes are scheduled in six temporary centers.*

Since all bank employees handle and contend with large sums of money they must be able to meet standards established by banking companies. The teller comes in direct contact with the public and creates the image of the bank. His sincerity, appearance, attitudes, and skills are of great importance. Distributive Education training is directed toward 1/3 of the bank employees in tellers and bank officers. About 20% of the bank employees are in management positions requiring courses, many of which are offered in the mid-management program, such as; Principles of Management, Business Organization, Credit Management, Personnel Management and Marketing.

(b) Occupational Trends: Banking is a growing business. Men and women are offered excellent opportunities for reaching officer positions. At present, 90% of the nation's business is transacted by check which represents about 32 million checks daily. The introduction of data processing, the establishment of branch and drive-in offices, are changing the type of positions available.

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*For additional information contact, Administrations Office, Hillsboro Junior College, P. O. Box 1213, Tampa, Florida 33601, or, Robert W. Andrew, Educational Administrator, AIB, c/o Marine Bank and Trust Company, P. O. Box 3303, Tampa, Florida 33601.

Employment for the State of Washington in 1961 was 11,300 showing a definite upward trend of employment to 13,450 in 1965. According to recent reports, managerial occupations account for 9% of the non-farm wage and salary workers in the Puget Sound Metropolitan area. Employment in the managerial occupations is projected to expand 9% in two years and 14% in five years. Employment for 1966 in the four-county area, Snohomish, Kitsap, King and Pierce Counties, showed 53,560. Six of the occupational groups will show shortages totaling 369 by 1970 with service and trade managers accounting for the largest shortages. These projected shortages will have to be filled in part through mid-management training.*

(2) Credit consists of such types of employment as: Credit Manager, Investigator, Collector, Credit Analyst, and Teller. Employment is found in such places as collection agency, commercial bank, credit bureau, credit checking organization, credit union, finance company, retail establishments, savings and loan, and wholesale establishments.

(a) Description: Credit long has been a convenience in our free-enterprise system and has become a means of speeding up distribution. Since World War II, credit is used not only to purchase in large quantities but to purchase inexpensive convenience items on a delayed payment plan.

Job opportunities are in interviewing, counseling, analysing and checking credit and collections. The ability to take information and make wise decisions is of great importance. In many credit positions a pleasant, but firm manner, must be developed. Collections often require considerable evening work.

(b) Occupational Trends: As our population is increased there has been a similar increase in the use of credit. This is especially true at the retail level. Because of the marked increase in new families during the 60's (the purchase of everything needed for the new home was largely made possible by credit), more people will be needed for these credit occupations. A number of community colleges are giving credit manager courses plus a basic marketing course but this is the extent to which new people are trained although in some instances evening programs have been established and efforts have been made by local credit union chapters to develop a program in this area.

Employment in the State of Washington in 1961 was 3,700 which rapidly increased by 1965 to 5,750 employed. It is reasonable to expect that there will be a continued increase along with population in this area of credit employment.

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*Occupational Manpower Projections, Washington State Employment Security Department.

Requests for "collectors" alone listed only in the Employment Security Offices showed 40 openings in 1969 with 19 filled and 32 openings anticipated in 1971.*

(3) Insurance consists of these types of employment: Broker, Claims Adjustor, Investigator, Agent, Office Manager, Personnel Manager, Property and Casualty Agents, Public Relations, Sales Person, Solicitor and Underwriter. Employment can be found in such places as: Commercial Banks, Insurance Offices, Property Management Offices, Real Estate Offices.

(a) Description: Since insurance companies are in business to sell policies, energetic, well-informed salesmen are in demand. About two of every five insurance policies are sold directly to the individual and business firms. Agents and brokers are usually responsible for finding their own customers or prospects and help plan the kind of protection to fit each individual need. The insurance agent is compensated in several ways -- a standard salary, salary and commission, advance on future sales, or a straight commission.

A recent survey of insurance agents brought out these qualities for success. Knowledge of the insurance business, personal sales ability and a broad acquaintanceship. Most companies prefer mature people - at least 21 years of age - who meet people easily. One in 10 of the people employed in insurance is in a managerial position.

(b) Occupational Trends: In Washington, insurance has grown more rapidly than any other phase of the economy. From 1947 to 1962 the number employed in insurance rose 74%. At the same time, total employment in the State rose 28%. This gives you an idea of the opportunities for employment and advancement in insurance. In 1961, 11,900 were employed in insurance and increased to 14,200 in 1965. This upward rise in employment since 1947 continues to increase. DE has worked closely with the Washington State Insurance Agents Association and a number of evening classes have been held. One center attempted, unsuccessfully, to develop an indepth program in this area.

(4) Real Estate consists of such types of occupations as: Agent, Property Management, Real Estate Developer, Realtor, Salesman, Branch Office Manager, Appraisor, and Business Owner. Employment is found in such places as: Building Contractor, Materials Supplier, Commercial Bank, Insurance Company, Property Management Offices, Real Estate Office, Savings and Loan.

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*Employment Security's report, November 14, 1969.

(a) Description: Real Estate brokers are dependable businessmen who not only sell real estate but sometimes rent and manage properties, make appraisals, arrange for loans to finance purchases and develop new building projects, manage their offices, advertise properties and search for saleable properties.

A license is required for work as a salesman or broker. Before a license is issued, a person must pass a written examination on Washington license law and the fundamentals of real estate transactions.

Salesmen are employed by brokers to show and sell real estate. They employ people to handle home buying clients.

(b) Occupational Trends: The average age of the real estate salesman and broker is considerably higher than that of most occupations. A high percentage of the people move each year so building is increasing and much activity takes place in the selling of homes. Growth in population and changing habits of living account for a great deal of real estate activity.

The Division of Distributive Education has worked closely with the Real Estate Commission in the past two years, with the State Division of Real Estate, and the Washington Real Estate Foundation in developing a program for certification in real estate.

Setbacks in 1969 in the building industry prevents a true estimate projection for the future. Also, positions open in this area are not generally channelled through the employment security offices. However, up-to-date statistics are now available through a research study recently completed by the Division of Distributive Education in cooperation with Eastern Washington State College. *

Summary of Part A Cluster

Of all employment in Distribution, 11.2% is in the Financial Service Occupations Cluster.**

B. The occupations listed under Retail Occupations are: Apparel, Accessories Stores; Food Stores; Furniture, Home Furnishings, Equipment Stores; Service Stations; General Merchandise, Drug, Proprietory Stores; Lumber, Building Materials, Hardware, Farm Equipment Dealers.

(1) Apparel, Accessories Stores consists of such types of employment as: Merchandise Managers, Advertising Managers, Buyers, Management Trainees, Sales Personnel, Modeling, and Store Ownership. Employment is found in Children's Wear Shops, Department Stores, Discount Houses, Clothing Stores, Mens Furnishings, Shoe Stores, Womens Accessories, Womens Ready-To-Wear.

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*Unpublished Master's Thesis Statistics, Archie G. Breslin.

**Charles E. Peck, January 1968 Survey to determine appropriate occupational programs in the field of Distribution and Marketing, p. 13, Volume I. University of Washington.

(a) Description: Much of the apparel industry is geared to the fashion cycle. Those responsible for the merchandising of apparel must be sensitive to the buying patterns of customers, be interpreters of fashion trends, and be skillful in the use of color, materials and style. In such items as furs, leather, and synthetic fabrics, a person must be up-to-date on the care and use of these goods. In selling these goods, knowledge in all phases of the fashion cycle is important.

(b) Occupational Trends: There are many trends showing a strong growth of the apparel industry. Employment in the State of Washington shows a 25% job growth between 1960 and 1970 for the young age group as they are becoming more fashion conscious. The changing patterns of personal life affect the markets. The increasing number of leisure activities has a definite impact on the apparel market. In 1969 we are witnessing, particularly in men's furnishings, more growth and more variation of style. Because of the fashion consciousness of the present, and the future, one community college has already planned and organized a fashion merchandising program in the mid-management area.

Employment, since 1961 has increased from 5,550 to 7,860 with the greatest growth in the recent years.

Based on statistical projections, using Department of Employment Security Manpower projections 1966-71, the following statistics applicable to textile and apparel sales personnel, are significant. (No data available from other than South Central and Puget Sound Metropolitan areas.)

. Current employment statewide - 3,540
. Number needed to fill present jobs - 887
. Expected jobs available in June 1974 - 3,420
. Present output of personnel from all avenues - 100

(2) Food Stores consists of such types of employment as: Dairy Department Manager, Grocery Manager, Meat Department Supervisor, Produce Manager, Sales Person, Store Manager, Store Owner, Variety Goods Manager, Cashier-Checker, Display, Demonstrator, Bakery Attendant. Employment is found in such places as: Delicatessen Store, Discount House, Neighborhood Grocer, Superette, Supermarket.

(a) Description: With the emphasis on volume selling in the grocery field, significant modification or constant changes in the training program must be made. Because of the highly competitive nature of the business, a person must be able to work under pressure, with speed and efficiency.

In the entry occupations, the employee is in constant constant contact with the public, whether it be in carrying packages or directing customers to the products they can not find. This individual must be strong enough to lift heavy packages and cases for the major part of the day. If a store sells wine and beer, one person at the checkstand must be over 21 years of age in order to check out these items. Eighty-five percent of the cashier-checkers are employed in the foods industry.* Thirty functions or more must be performed by checkers and cashiers in the supermarket today. Supermarket managers must rely on the checker to safeguard their money from check forgers and short change artists. In produce work the knowledge of fundamentals of display is necessary to develop the sales necessary for perishable products. At the supervisory or management level, an individual spends most of his time planning, organizing and directing the many activities of a modern store. He generally works six days a week. The wage structure differs throughout the state. In general, the wages in Eastern Washington and the wages in the metropolitan areas of the state are higher than those in other areas. In Seattle, the union contract specifies an entry wage of $1.92½ for part-time employees and beginning clerks at $2.25 per hour. Senior journeymen earn $3.72½ per hour.**

(b) Occupational Trends: Because the grocery industry has gone through a revolution during the past 15 years due to our population increase, income increase, variety and availability of products, stores are larger and more numerous. All this has increased the need for mid-management positions, produce heads, department heads. Employment in the State of Washington in 1961 increased from 20,000 to 24,200 in 1965. Recent communications with the head of the Food Dealers' Association have indicated that food stores employ more people than any other industry in the State of Washington.

Nationwide, the industry employs from 100,000 to 150,000 checkers every year. A survey of some 1,000 employees in 10 supermarkets indicated that the employees wanted more training in reference to checker operations. Thirty-six percent of those interviewed stated that the cash register operation was a major area in which marketing training was desired. Another 33% said the training was needed for the proper classification of the proper recordings. Not only have experienced supermarket employees expressed their need for proper training, but new employees have also indicated a lack of proper training. The National Cash Register Company and the Supermarket Institute, in cooperation with Distributive Education, have developed a model 90 hour course for cashier-checkers as well as an indepth two-year program in food marketing and management seminars for present employees. It is now ready for implementation in the State of Washington. The supermarket industry's number one problem is securing trained people for the existing and expanding operations. One thousand new supermarkets will open each year for the next decade. This will create 130,000 to 160,000 additional in-store managerial positions. Attracting enough supermarket careerists to fill these jobs, and making sure they receive the kind of management training needed to run these markets are the two big challenges confronting the foods industry today.*

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*Occupational Manpower Projections, Washington State Employment Security Department and U. S. Department of Labor Statistics.

**Grocery Agreement (King and Snohomish Counties), Allied Employees, Inc. and Retail Clerks, Local #1105, Effective to April 1, 1971.

At present the State of Washington is experimenting with the use of the Mobile Cashier-Checker Training School for use in those areas of the State where no permanent center is located. An active advisory committee of management and labor is sponsoring, not only this program, but currently they are giving consideration to an indepth program for a two-year period covering the food industry.

The following statistics applicable to the foods industry were compiled from the Employment Security Department and statistically projected in terms of manpower needs to June of 1974.**

Cashier-Checkers - (85% in Grocery area)

- . Current employment - 7,263
- . Number now needed to fill jobs - 1,[illegible]3
- . Expected jobs available June 1974 - 7,063
- . Present output of personnel from all avenues - 245

Miscellaneous Merchandising Occupations (Principally General Retail Sales Personnel and Department Managers).

- . Current employment - 10,913
- . Number needed to fill jobs - 1,670
- . Expected jobs available in June 1974 - 9.365
- . Present output of personnel from all avenues - 680

(3) Furniture, Home Furnishings, and Equipment consists of the following types of employment: Department Manager, Floor Manager, Display, Furniture Inspector, Interior Decorator, Sales Person, Store Owner, Buyer, Demonstrator. Employment is found in such places as: Glassware Stores, Drapery, Curtain and Upholstery Stores, Department Stores, Floor Covering Stores, Furniture Stores, Household Appliances, Musical Instrument Stores, Office Equipment, Radio, TV, and Record Shops.

(a) Description: A sales person displays and sells items such as bedding, floor coverings, drapes, television and decorative home furnishings. This individual is called upon to advise on room layout, design, period styles, the construction of various pieces of furniture, harmonizing and complimentary color schemes. It is common for the sales person to take samples to a customer's residence to see the merchandise in all the relationship. A person with an artistic bent is needed in this type of employment. Positions in the home furnishing business are generally above and beyond high school age. Though DE has worked closely with the furniture association, we have not been successful in getting together a satisfactory program to serve their specific needs.

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*Lee Smith, Vice President of Jewel's, Chain Store Age, February, 1969.

**Dennis Coplen, Projections, Division of Distributive Education, October 1969.

(b) Occupational Trends: Many factors point to the need for training in this area because of the growth in families, increased income, a wide range of attractive furnishing, and a second home idea tied in with the recreation home or room. Self service has not proved satisfactory in this area and expert advice is necessary for the buyer. The employment in 1961 was 5,200 with a gradual and steady increase to 6,600 in 1965. Today in the appliance and television industry, the growth has been phenominal and consistent. Continual expansion is expected with predictions of an increase of 40% or more in the next five years.*

(4) Automobile Dealers, Service Stations, Marine and Aircraft consists of such types of employment as: Service Station Dealer, Manager, Sales Person, in each of the above areas.

(a) Description: Meeting the automotive needs of the customer with the idea of giving service is important in the above types of employment. If you enjoy meeting and helping people, if you like to work with machines, the service station course offers an interesting kind of work with a relatively low capital outlay. It is possible for a person to go into business for himself. Competition in the service industry is high. This, along with the increase in highways, changing routes, and the number of automobiles, calls for well-trained people. A person becomes an excellent sales person if he also has knowledge of automobiles, machines, etc.

(b) Occupational Trends: You will note that there are 18,750 employed in this business and there has been a sharp increase from 1961 to 23,800 in 1965. There is no reason to believe that there will not be a continued increase and demand in the future. Many of the service stations also sell items of merchandise from time to time which might be in direct competition to those of department store or specialty stores but since they are sold at a service station, they are easily accessible and trends will indicate that more and more of this will be done in the future.

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*Director, Manpower Development, General Electric Company, Major Appliance and Hotpoint Division, Appliance Park, Louisville, Kentucky 40225.

Current statistics for service station attendants are as follows:

- . Current employment - 7,677
- . Numbers now needed to fill present jobs - 2,750
- . Expected number of jobs available by June 1974 - 12,090
- . Present output from all avenues - 107

There has been approximately a 100% increase in petroleum employment.*

(5) General Merchandise, Drug and Proprietary, and other Retail stores consists of these types of employment: Managers, Buyers, Credit Department Managers, Floor Managers, Merchandise Managers, Merchandise Adjusters, Returned Goods Department, Promotion Manager, Display Manager and Credit Managers. Generally they fall into the same types of occupations found in all businesses. Employment can be found in a wide variety of places: Book Stores, Camera Supply Stores, Discount Stores, Drug Stores, Farm and Garden Stores, Fuel Dealers, General Store, Department Stores, Gift Stores, Secondhand Stores.

(a) Description: In the course of his career, a sales person arranges the display and sells directly from the sales floor. It is their purpose to know the stock and find out the desire of the customers so that he may make a choice from a number of possibilities. To do this effectively, he consistently checks the stock and keeps periodic inventories. This individual must have a pleasing appearance and speaking voice. With experience, he should develop and become more and more sensitive to the desires of people and help them with the problem of buying intelligently. He needs to be quick and accurate in money matters, must have the ability to work well with, and enjoy people, and with the advent of larger businesses, there are many managers of departments that need to supervise and manage operations and if they do so properly, may expect a promotion to greater responsibilities.

There are various types of salary arrangements, straight salary plus commission, entirely commission or entirely straight salary. The most popular is minimum salary with percentage based on sales. The entry level is rather low in comparison to other occupations, but the work is pleasant and it has the potential for increase in income for those who intend to make it a career.

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*Analysis by LeRoy McCartney of Employment Security Print-Out, November 14, 1969. State Office of Distributive Education.

(b) Occupational Trends: Retailers, to be successful in our competitive society, must be able to adapt to changing conditions, be creative, and efficient. The trend in all large companies in virtually every industry is to aim for youth in advertising, marketing, and promotion. Today's youth is retailing's energy source for tomorrow's management.* The most talented and creative minds in studentdom today are talking about the freedom to work within the system while remaining unique at the same time. Their desire to remain unique can be capitalized upon in the retail, department and general merchandise business. Employment in 1961 was 36,600 increasing to 51,400 in 1965.

Statistically projected current employment of commodities salespeople are as follows:

- Current employment - 21,603
- Number needed now to fill present job - 4,167
- Expected number of jobs available by June 1974 - 19,171
- Present output from all avenues - 1,843

These figures compare favorably with the general merchandise employment needs shown by The Employment Security Printout of November 14, 1969 -- 2,003 openings in the year 1968, openings filled 1,212, and 1,761 openings expected in the year 1971.**

(6) Lumber, Building Materials, Hardware, Farm Equipment consists of employment similar to those listed in the general merchandise group.

(a) Description: Two types of customers patronize these businesses. One is the expert contractor, architect, designer and farmer. The other is the do-it-yourselfer, who needs another kind of service - advice in general, assistance in finding materials needed and possibly introductions to new products. This is again an occupation for the person with a creative imagination, the ability to read blueprints, to figure costs, and one willing to pay attention to detail. Programs should be planned with the various associations, especially the Western Retail Lumbermen's Association.

The earnings in this area are much like those in the general merchandise group except perhaps the fact that this business demands an older person beyond the teen age and generally speaking, demands a higher income to start with.

(b) Occupational Trends: Most of the businesses above require specialized service but wherever possible self service and cash and carry systems have been initiated. In some instances these trends indicate that there is a greater need for specially-trained people to give advice. Employment here, though only 6900 in 1961 showed a slight increase to 7600 in 1965.

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*Department Store Management, May 1969.

**Statistics on file, DE Office, K. Otto Logan.

More attention needs to be given to occupations classified as Agri-Distribution where the sales people need a background in Agriculture in terms of serving farmers, working in farm coop stores, farm equipment supply stores, feed and seed stores, florist shops. There are approximately 7,000 businesses in Washington State that can be classified under the heading Agri-Distribution. In addition, largely overlooked is the field of selling large equipment to corporation contractors. Success in this field often requires the knowledge of machines found in the trades and industry area.

Summary of Part B Cluster

Of all employment in Distribution, 43.1% is in the Retail Occupations Cluster.* The three highest ranking areas of employment within the retail cluster category are: General Merchandise, Food Distribution and Service Stations.

C. In the cluster area of Sales Occupations, attention has been confined to: Mail Order House and Vending Machines. Direct Selling, Mail Order and Vending Machines consists of such types of employment as: Routeman, Vending Machine Operator, Direct Salesman, Catalogue Office Manager, Advertising Manager, Buyer, Canvasser, Order filler, Packager.

(1) Description: Direct selling consists of operating ones own business, joining a sales staff that uses direct selling procedures, or serving retail stores on a house to house basis. The duties include soliciting sales, interviewing, demonstrating and making out reports.

Mail order companies have approximately thirty stores in the State of Washington. Two-Thirds of these are without large payrolls and the other 1/3 are very large business establishments. The larger establishments offer management trainee programs with nationwide and even worldwide relocation at the end of training. Many of the entry locations deal with the movement and care of merchandise. The catalogue offices require a specially-trained direct selling staff.

Vending machines are largely one-man operations. It is necessary for the individual to fill the roles of salesman, bookkeeper, serviceman, mechanic, merchandiser, investor, inspector, truck driver and traffic manager. It is important to know how to find prime locations for vending machines.

(2) Occupational Trends: New methods of direct selling are opening up more opportunities for the future. There is a greater use of telephones to promote sales. The person who canvasses his area for leads is able to use his time more effectively by calling on

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*Charles E. Peck, January 1968 Survey to determine appropriate occupational programs in the field of Distribution and Marketing, Volume I, University of Washington.

in developing the business one must have a well organized plan of work. Knowledge of proper use of the telephone is important so as not to offend prospective customers.

People in direct selling businesses must consider carefully service to the customer. A milk route salesman can increase sales for the entire company through regular service by keeping customers advised of new products.

Other examples of direct selling are: Vacuum cleaners, cooking utensils, magazine sales, Fuller Brush. When the approach is properly made, an individual can make a fairly sizeable income with very little capital outlay in the above types of business.

Projected employment of current statistics on routemen are as follows:

. Current employment - 4,070
. Number now needed to fill present jobs - 773
. Expected number of jobs by June 1974 - 3,149
. Present output from all avenues - 40

D. The occupations listed under Sales-Supporting Occupations are: Advertising, Traffic Management, Warehousing, Storage, Transportation, and Purchasing.

(1) Advertising consists of the following types of employment: Advertising Executives, Add Manager, Research Analyst. Employment is found in such places as: Add Agency, Newspaper, Outdoor Advertising Firm, Retail Establishments, TV Station.

(a) Description: Much advertising is on a nationwide basis and increased emphasis is placed on it because of the trend toward self-service. Through billboards, packaging, TV, new products and services are called to the attention of the public and in comparison to other occupations, the need for specialized positions are limited.

(2) Traffic Management, Warehousing, Storage, Transportation, and Purchasing consists of the following types of employment: Freight Traffic Manager, Traffic Manager, Shipping and Receiving Clerk.

(a) Traffic management purchasing, warehousing show a tremendous employment area - 1961 25,450 increased to 30,200 in 1965. Nearly one-half of our individual plants do not have a traffic manager. As businesses expand and establish branches, expert attention will have to be given delivery, packaging and storage. The traffic representative sells transportation services, movement of goods and people by air, rail, steamship and truck and some goods by pipeline. Travel agencies are growing. People need these services. Those who are employed must know laws, rules and schedules. They must be quick and accurate.

The following statistics of interest in this area are most revealing.*

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*A report by Matt Moskal, Specialized mid-management coordinator in Transportation at Green River Community College, Area III, November 13, 1969, District Meeting.

- In Washington railroads employ - 18,500
- Motor cars (Private Company - Sears, Safeway, etc.) 200,000 employed
- For Hire (Such as Northern Pacific Transport, Consolidated Freight, Garret, ONC) - 60,000 employed
- Steamship - Port of Seattle alone - 30,000
- Airlines - 10,000

"Few people understand that transportation involves more than the passenger agents, stewardesses, but covers warehousing, getting produce, groceries, etc., from one area of the country to another, scheduling, dispatching, order clerks, beginning with a salary of $2.75 to $4 per hour. Yearwise, the average salaries are $8,000 a year, ranging from $5,000 to $18,000 a year. Surprisingly, over 50% are women employees.

Another emerging area is the business of purchasing. Purchasing for school districts, purchasing for big business corporations, and purchasing for various public agencies, cities, and counties. Current employment shows 6,930 with 203 positions unfilled. Since entry into this area comes largely from within a company or organization, it is difficult to project future needs. Distributive Education has worked with the Washington Purchasing Association in terms of an educational program but as yet no programs have materialized.

E. The occupations listed under Service Occupations are: Occupations dealing with recreation and leisure.

(1) Recreation and leisure consists of the following types of employment: Concessions Attendant, Golf Course Attendant, Recreation Establishment Manager, Tour Conductor, Travel Agent. Employment can be found in such places as: Amusement parks, Boat sales, Golf courses, Retirement homes, Travel agencies.

(a) The recreation and leisure field is considered to be one of the rapid-growth industries of our day. This growth is developing because of the trend toward a shorter work week, greater spending power, more retired persons who possibly participate in recreation.

Jobs in this area put the individual in direct contact with the public. In many recreational activities there is considerable night work and others where service is offered around the clock with 4 shifts of 8 hours each. Other activities are of a seasonal nature. All of these point up the importance of planning and control so that people will not find themselves in fad-type services that quickly disappear. A person may work with specific age groups - young people, children, retired persons. It is important that the people understand the problems of the particular group with whom he is working.

(b) Occupational Trends: New innovations in recreation form facilities will be on the increase. Tourism has grown to an 11.4 billion dollar worldwide industry.* A booklet titled, "Development of Tourism Curriculums," State University of New York, investigated the need for a two-year curriculum in various states for airlines, automobile rental organizations, and travel agencies.** Many business developers are planning complex recreational centers that combine theatres, bowling alleys, swimming, ice skating, and retirement homes. The need for management and knowledge and skills will be in great demand.

The employment in the retirement business has shown a steady increase from 29,000 in 1961 to 40,500 in 1965. The management aspect of these businesses is DE's contribution to the program planning. This phase will be projected in the middle management areas of all businesses in the summary report.

(2) Restaurants, Hotels, Motels, Tourist Courts consists of the following types of employment involving distributive occupations: Tourist Camp Manager, Supervisors, Recreational Heads, Front Office Contact People, and Managers.

(a) Description: In hotels and motels the primary job of the front office employees such as the bellman and desk clerk is to meet the guests and give service in a courteous way. Waiters and waitresses need to have knowledge of how to deal with customers. Entry jobs are usually service jobs where one must be watchful of the needs of others and be willing to meet their wishes. Those in managerial positions must have a working knowledge of all areas for which they are responsible.

Distributive Education would give sales management and customer contact supporting courses to Home Economics in waitress training and T & I in Chef's training. Close working arrangements on management should be developed with the Washington Hotel and Motel Association and the Restaurant Association.

An analysis of the 1968 opening positions in this area based on the reporting offices of Employment Security only showed 109 openings in 1968. This does not cover the positions requested and filled outside of the employment security offices since most of the promotions are made within the industry. Statistical projections for the year 1975 based on needs in 1968 and openings expected in 1971 showed a stead upward trend.***

(b) Occupational Trends: Marked changes are taking place. One of the leading occupations is tourism which adds to expansion in the hotel and restaurant business.

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*Occupational Education Bulletin, Volume IV, No. 15, AAJC, 1315 16th Street NW, Washington, D. C. 20036.

**8 Thurlow Terrace, Albany, New York, 12201. Copies available upon request.

***Based on findings of LeRoy McCartney on file in State DE Office.

(1) Export and Import consists of the following types of employment: Export Manager, Export Agent, Export Broker, Export Trade Consultant, Buyer, Freight Representative, Import Purchasing Agent, International Salesmen, and Traffic Manager. Employment is found in such places as: Commercial Banks, Freight Forwarder, Marine Insurance, Retail Establishments, Transportation and Wholesale establishments.

(a) Description: Importing and Exporting are usually considered together. Their training needs differ, however. In importing the problems deal with the needs of the U. S. market. In buying materials they will also need to know U. S. Custom regulations. The exporter will handle goods that meet the conditions, cultures and needs of foreign markets. A knowledge of foreign tariff laws and money values is necessary.

Our nation has encouraged businessmen to sell more abroad and the assistance of the Department of Commerce is valuable in giving trade leads, free display space in the U. S. trade centers abroad, and information on foreign surveys, general conditions and needs. Many an importing business has grown from a small start by one person. For example, Mount Vernon has a flourishing business in terms of hand made art items associated with Tahitian-Hawaiian culture. These items are sold to these countries and the countries in turn sell them to tourists.

Recently the Port of Seattle checked on the number of people in wholesale and retail export-import trade, including banking and marine insurance. At the Port of Seattle alone there are 850 employed in this business.

(b) Occupational Trends: Washington is in a favorable position to increase international trade. The past World's Fair in Seattle and the possibility of developing the Columbia River as a tradeland will have its effects. Import waterports are developing in inland Washington, even into the Tri-City areas. Trade with foreign nations is taking on new aspects. The Division of Distributive Education has cooperated closely with the Department of Commerce, to offer programs supporting export expansion.

(2) Merchant Wholesalers, Manufacturers' Sales Branches, Petroleum Bulk Plants, Terminals, Merchandise Agents, Brokers, Assemblers of Farm Products consists of the following types of employment: Buyers, Branch Managers, Management Representatives, Purchasing Agents, Sales Manager, Wholesale Salesman, Sales Supervisor, Shipping Clerks, Stockman, Industrial Salesman, Credit Analyst, Business Owner, Marketing Research.

(a) Description: In wholesaling and in the manufacturers' sales, it is common practice to have an individual assigned to a territory for which he is responsible. This territory in some instances consists of a part of a city in a large urban center or it might cover several stations in a sparcely populated area. The salesman's success depends on the development of repeat business with the same customers. In many low-priced merchandise lines, such as notions, toys and cigarettes, the salesman's principle responsibility is service. This often includes inventory work, stocking shelves, including display work. In heavy machinery or the chemical industry a salesman might be part of a team of specialists working for several months on one particular account. In some areas such as medical supplies, electronic equipment or agricultural equipment a sales person needs a technical understanding in addition to his marketing training. Generally, the successful personality traits would be pleasant, outgoing personality, a great deal of persistence, the ability to get along with people and the ability to sense the needs of the customer.

(b) Occupational Trends: Employment in this area in 1961 was 50,300 and in 1965 it was 57,700. This gives us an estimate of the number employed in this area. Approximately 30% of those employed in trade industries in the State of Washington are in the wholesaling field. As more and more businesses combine their buying, a person in this occupation would be working on a committee of experts for this business. There is a trend to use computers to check stock, sales and buying patterns. All of these cause changes from warehousing to sales promotion. This change in taking care of the paper work will mean more emphasis on training of workers. Management will need to know how to use the computers and they will have to make decisions in management important for the future.

ACROSS THE BOARD SUMMARY OF EMERGING AND CONTINUING OCCUPATIONAL SHORTAGES IN DISTRIBUTION*

A. Middle-Management--Supervisory, Department Heads, and Junior Executives positions are the emerging occupations cutting across all six of the cluster occupations defined earlier in this document.

- . Current employment - 54,814
- . Number needed to fill present jobs - 1,814
- . Expected openings in 1974 - 4,282
- . Present output from all avenues - 1,147

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*Detailed information on file in DE Office, K. Otto Logan, Director

B. Specialized Sales positions requiring technical knowledge in such areas as Food Marketing and Wholesaling, Financial Service and Sales-Supporting occupations.

- . Current employment - 13,907
- . Number needed to fill present jobs - 797
- . Expected openings in 1974 - 3,032
- . Present output from all avenues - 197

C. Entry into many of the occupations listed in this report may be partially met by expansion of the high school distributive program but middle management junior executive positions and technical knowledge in specialized positions must be the community college and vocational-technical institutes' area of concentration and contribution.

D. Part-time cooperative programs developed by the school and the allied business association are an essential ingredient for success.*

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*Charles E. Peck, January 1968 Survey to determine appropriate occupational programs in the field of Distribution and Marketing, p. 140, Volume I, University of Washington.

UNIT XIII - CAREERS IN MARKETING AND DISTRIBUTION
Part 1 - Survey of Distributive Occupations

Length:	Open
Prerequisite:	A tentative career goal in marketing;students should be familiar with brainstorming, conference method and other group activities.
Description:	Group examination of the six occupational clusters in marketing and distribution. Introduction to PERT (Program Evaluation and Review Techniques).
Objectives:	At the completion of this lesson the student will be able to identify the six distributive occupational clusters and list several occupations in each cluster.
Sources:	Vocational Needs in Distributive Education, 1970, (Attached) Retailing Principles and Practice, Richert, 5th Ed., page 545-563. Marketing and Distribution Program, 1970, CCOE

OUTLINE

I. Identifying Occupations in the Field of Distribution
    A. Distribute and discuss abstract. (Activity 1)
    B. Identify six cluster areas
    C. Groups of 3-5 students select a cluster to report to the class.
II. PERT Group Project
    A. Explanation of PERT (Activity 2)
    B. Students complete Planning Your Life With PERT. (Activity 3)
    C. Group Project Activity - use PERT Group Project Outline (Activity 4,5,and 6)

ACTIVITIES

1. Students groups of 3-5 select an occupational cluster and prepare a group report using the attached outline(Activity 1).
2. Introduction to PERT, Part 1, 2, and 3. (Activity 2)
3. PERT Basic Data Form (Activity 3)
4. PERT Program Planning Form (Activity 5)
5. PERT Group Project Outline (Activity 4)
6. PERT Critical Path Chart (Activity 6)

UNIT XIII - CAREERS IN MARKETING
Part 1 - Survey of Distributive Occupations
Activity 1 - Careers in Marketing - Group Project

I. Types of Jobs

    A. Entry Level

    B. Career Level

    C. Management Level

II. Description of Occupational Cluster

III. Trends

IV. References

    A. Minimum of 5

    B. Include an Interview

UNIT XIII - CAREERS IN MARKETING
Part 1 - Survey of Distribution
Activity 2

PLANNING YOUR LIFE WITH "PERT"
INTRODUCTION

*Transparency
Numbers

A-61 THESIS: Why Leave Your Future To Fate? You Can Control Your Own Destiny If You Are Willing To Think Ahead And Plan.

A-62 I. During the 1940's a new philosophy called "Existentialism" was developed by a couple of French writers. (Sartre and Camus)
  A. Their philosophy grew out of a sense of disillusionment and from the fear that life had no purpose at all.
  B. One aspect of existentialism was a timid submission to fate.
    1. Existentialists felt that they could not control their own destinies.
    2. This was understandable in light of the senseless tyranny and destruction in Europe during World War II.
    3. But, they also felt that it was a mistake to even try to control events.
    4. The result was an attitude that allowed a person to be pushed and cuffed and battered by life without so much as a whimper.
  C. You probably see many people like this amoung us today. They are a legacy of this age of nuclear terror and big-power politics.
    1. Some of these people you know as "Hippies". Hippies often consider themselves modern-day existentialists.
    2. Others just drift
A-63 3. Actually, we all tend to do this, but we don't have to. We can control the events of our lives.

II. How can we plan and control our lives and leave as little to chance as possible?
  A. Basically, we have to develop a realistic plan and try to stick to it.
  B. A highly successful industrial technique for planning has recently been adopted by a great many other activities:
    1. Your own school system uses it.
    2. Government uses it.
    3. The world's fairs at Seattle, New York, and Montreal used it.
    4. The contractor for the new Seattle First National Bank Building, to be the tallest building in the west, is using it.
    5. Social Welfare Agencies use it.
    6. People use it for themselves.
A-64 C. The technique is called "PERT" -- Program Evaluation and Review Technique.
  D. Before I can show you how to use it for yourself, you will have to develop some basic ideas about your future.

A-65

1. I am going to hand out a form that will help you organize some ideas about your future. (PERT Basic Data Form)
2. Let's go over this form together.

III. Use this form as a rough draft for plotting the course of your life over the next few years.

A. What Do I Want Out Of Life? List such things as:

1. The sort of home you want. (How expensive, what kind of neighbothood)
2. What sort of mate you want. (His or her interests, how much education)
3. How large your family will be.
4. How much you expect to do for your children. (College, Europe, Cars)
5. Do you want new cars, or are used cars O.K.? Do you like expensive cars?
6. What sort of leisure activities will you need?
7. What position in life does your self-image call for?

B. General Or Specific Kind Of Work I Want To Do All My Life:

1. You may not know specifically what you want to do. If you do know specifically, write it down. You may want to put down a second choice.
2. If you don't know, write down the level of work you expect to do. (Professional, semi-professional, technical, managarial, selling, clerical, skilled, unskilled)

C. What Kind Of Work Conditions Do I Need?

1. Will you be satisfied with an hourly wage, or do you want the security of a salary? Are you adventurous enough to work for commissions?
2. Would you prefer white-collar work or blue-collar work? Those who work with their hands often have more prestige and pay than white-collar types. White-collar workers frequently do manual work as part of their jobs.
3. What sort of colleagues will you be happiest with?
4. Do you want the protection of a union, or are you the independent type?

D. How Much Income Will I Need? Based on what you want out of life and the type of work you expect to do, how much income will you need?

E. I Will Need To Acquire Education And Training As Follows:

1. Most jobs require a certain basic level of general education.
2. Jobs also generally require some degree of specific training.
3. Most jobs have different levels of skill, responsibility, and pay. Be sure to plan for the education and training that will enable you to reach the level you want.

F. Before I Can Enter A Training And/Or Education Program, I Will Need This Preparation:

1. To enter college, you must graduate from high school with certain subjects and a certain grade point.
2. Training programs often require a certain basic education or the ability to pass tests on general and specific knowledge.

3. Training programs often require that you be hired by the company first and prove yourself. Sometimes, a company will not hire you without prior experience.
4. If you go to any kind of a school, you will need to have some money and/or scholarship funds.
5. Perhaps most important of all, what kind of attitudes will you need both to succeed in education and training, and then to succeed in your work?

A-66 G. These Are The Other Hurdles I Must Face:

1. Consider every obstacle, every obligation, every probable difficulty that will stand in your way. Be completely realistic.

H. My Assets Are: You probably have a great many assets, material as well as intangible. Write them all down. Here are examples:

1. Help you can expect from parents.
2. Your earning power, now and in the future while working toward your goals.
3. Your savings
4. Your ability to win a scholarship or other financial assistance
5. High School training available and other low-cost training.
6. Your grades and scholarly ability.
7. Your personal determination to succeed.
8. Your good appearance, speech, and personality.
9. Valuable personal contacts.

I. My Liabilities Are: Be coldly realistic about your liabilities, write them all down.

1. Perhaps you can expect no help at all from parents.
2. Maybe you have low grades or haven't met the requirements for college or a training program.
3. Maybe at this point you don't really know what you want out of life.
4. In most cases, your earning power is probably dismally low.
5. If you expect to get married, this will obviously prevent you from doing great things.
6. Perhaps you expect to get drafted.
7. Maybe your personal appearance and personality aren't what they ought to be.
8. Your attitude might not permit you to undertake the hard work necessary to reach your goals.

IV. Your assignment for tomorrow is to take this "PERT Basic Data Form" home and put as much thought into it as you can. Involve your parents.

Tomorrow, we will learn how to actually make a "PERT" Program out of the information you have worked up.

PLANNING YOUR LIFE WITH "PERT"
PART II

A-71 THESIS: USING THE THOUGHTS WE HAVE WRITTEN DOWN ABOUT OUR FUTURE, LET'S SEE HOW WE CAN ORGANIZE THEM AND ACTUALLY PROGRAM THE NEXT FEW YEARS OF OUR LIFE.

I. Using the rough data you wrote down on your "PERT" Basic Data Form, you may now take the next steps.

A-72 A. First, you should list all the "events" that must take place on the way to your ultimate goals.

1. An "event" is the Pert way of saying that some activity has been done.

A-73 2. Therefore, your goals and what you do on the way to them should be written down and described as accomplishments. These accomplishments, or "events" are milestones that will tell you if you are progressing on schedule.

3. Here are examples of events properly described:
   - a. Graduation from high school
   - b. Acquisition of a scholarship
   - c. Achievement of $1500 in savings
   - d. Completion of military service

4. As you can see, a great deal of time, effort, and activity lead up to each "event". To make a PERT Program, however, we must temporarily disregard activities and instead make statements that prove that an activity has been completed. Such statements, then, are called "events".

A-74 B. After listing all events that are relevant to reaching your goals, you should determine how long it will take you to reach each one,

1. Write down the most likely time, in months, that it will take to reach each event, starting now.
2. In parentheses, note the least time and the optimum time. (This will reflect the shortest time under ideal conditions, and the longest time if everything goes wrong short of a major catastrophe).

C. Use the Form, "PERT Events and Times," to list the events leading up to your goals.

(TEACHER: You may wish to hand out one copy of the form to each student at this point.)

A-75 1. Using this form, let's take a look at what one student might plan for his own future.

(TEACHER: Using the transparency, which matches the form just handed out, you may want to point out some of the techniques for filling out this form, such as:)

- a. The manner in which each event is stated as an accomplishment.
- b. The orderly relationship of each event to the ultimate goals.
- c. The realistic self-appraisal evident in this studen't list.
- d. The fact that this student did not set goals too far into the future. He can program those later.

A-76

e. The carefully thought-out times.
f. The assignment of a number to each event. These numbers will be necessary tomorrow when we diagram, or "Program", the events.
g. The attention only to major events. Minor events can be detailed and programmed separately if necessary.

2. Now, can you fill out your own form?
3. When you have finished, your form will contain the final information you will need to construct a "PERT" Program, the same as industry uses.
4. Although this example shows the plans of someone going to college, PERT is equally valuable for everyone, whatever his goals in life.
5. It is important for you to plan some sort of post-high school training or education. Finding a job and increasing your earning power will be even more difficult as the years go by if you don't.
6. Take this form home tonight.
   - a. Involve your parents.
   - b. Use your "PERT" Basic Data Form for basic information.
   - c. Be realistic, and try to think of everything.

PLANNING YOUR LIFE WITH "PERT"
PART III

THESIS: NOW THAT YOU HAVE NAMED THE "EVENTS" THAT HAVE TO HAPPEN BEFORE YOU CAN REACH YOUR GOALS, LET'S MAKE UP A "PERT" PROGRAM THE SAME WAY THAT INDUSTRY DOES IT.

A-81 I. First, let's review the guidlines you followed in writing down "PERT" events and times.
   - A. Activities all end with definable events. The event is the indication that the activity has been completed.
   - B. Each event requires a certain number of months to reach.
   - C. Each event is numbered.
   - D. Non-events are not numbered.
   - E. Events are organized according to type: Major goals, Educational events, Personal improvement events, etc.
   - F. The form, "PERT EVENTS AND TIMES," was developed only for this problem. You should develop your own organization for other problems.

II. Now, using scratch paper, let's attempt to lay out a logical diagram of our event numbers. There are several rules we have to observe:
   - A-82 A. Recognize the major, or key, events and place them roughly on the paper where they will occur, from left to right.
   - A-83 B. Next, begin placing the other events approximately where they ought to occur, in relation to the major events and to each other.
   - C. It will occur to you that certain events must precede other events. These are known as "Predecessor events."
   - D. A "Predecessor event" is one which must occur before another event is able to occur.
   - A-84 E. Draw an arrow pointing from each predecessor event to its "successor event".
   - A-85 F. A "Successor event" may have more than one "Predecessor event." This merely indicates that several things might have to happen before a certain event can take place.
   - A-86 G. Similarly, a "Predecessor event" may have to happen before several "Successor events" can take place.
   - H. Arrows should not cross. They should be straight, if possible. If it is not possible, neatly curved or angled arrows are all right.
   - A-87 I. On the arrow pointing to an event, put the time it will take(normally) to reach that event from now. If more than one arrow points to an event, you need to put the time on only one arrow.
   - A-88 J. A "PERT" Program can take any form, so long as it is logical and represents the problem.

A-89 III. Now, let's see how Alfred E. Newman might have diagrammed his PERT Program.
   - A. On this diagram, you can see that there are two or three places where a great many predecessor events converge on one successor. These are obviously the major events, the focal points of the program. Alfred probably put these in first.

B. Note that all his arrows are straight, none cross paths, and he carefully placed his events in logical order across the chart.

C. Note also, that the times have been placed on the arrows leading to each event. If more than one arrow leads to an event, the time is placed on only one.

IV. Before you are turned loose to develop your own PERT Program, let's pick up a few loose ends and discuss some of the details of PERT.

A. First, PERT users usually identify what they call "The Critical Path" in their programs.

1. By referring back to your outline, "PERT EVENTS AND TIMES," you will probably find that several of your events must happen within a short span of time.

2. If such events do not happen within that short span of time, they delay other events.

3. PERT Programmers identify these critical events and give them special attention.

4. On your chart, these events are called "The Critical PAth".

B. Some events in your PERT Program may involve some complicated activities to reach, even though you don't show this on your chart.

1. A PERT Programmer would, if necessary, make a subsidiary program of the sub-events leading up to that event.

A-90 2. For example, Alfred E. Newman might have listed these sub-events that would have to happen before he could gain admission to college.

3. He might have PERT Programmed them in this fashion.

A-89 C. PERT can be a valuable tool all your life for doing almost anyth[illegible] that takes planning. A-91

1. Plan a term paper with it.

2. Plan and execute a group project.

3. Get ready for a vacation.

4. Plan the senior prom.

D. PERT is the most important management technique used, not only in business, but in almost every profession.

1. Boeing uses it to build airplanes.

2. Contractors use it to build buildings for Boeing.

3. The Pentagon uses it to supply Viet Nam.

4. Doctors use it before a complex operation.

5. School districts use it to plan curriculum.

E. In business, PERT Programs becomes so complex that the only way to keep track of all the activities, times, and events is with a computer.

F. PERT is so important in business and the professions, that your knowledge of it will be very valuable to you. Use it wherever you can.

V. Now, see how beautiful, neat, clean, systematic, logical and profound your PERT Program can be. (TEACHER: You may wish to put transparency A-88 back on the screen to serve as a model for your students)

Definition of Selected Terms

Activity - The work required to accomplish an event.

Critical Path - The longest path through a network.

Dummy Activity - An activity which represents no work or expenditure of time; inserted to maintain the logic of the network.

Event - A specific instant of time, either the start oR the completion of a mental or physical task.

Most Likely Time - The length of time in which an activity could probably be completed.

Optimistic Time - The length of time required for an activity if everything goes perfectly.

Pessimistic Time - The length of time required for an activity if everything possible goes wrong and holds up completion as much as possible.

PERT - Program Evaluation and Review Technique: a quantitative planning and control device.

Skeleton Network - A complete but undetailed network showing only the main parts of the total project; used as a basis for drawing detailed networks.

Successor Event - The event immediately following the one in question.

Time Estimate - The approximation of the length of time required to complete an activity.

Term	Description	Referent
t_o	Optimistic time	Activity
t_m	Most likely time	Activity
t_p	Pessimistic time	Activity
t_E	Expected time	Activity
T_E	Earliest expected time	Event
T_L	Latest allowable time	Event
slack	Project schedule time minus length of path	Path

$$Te = \frac{t_o + 4t_m = t_p}{6}$$

PERT BASIC DATA FORM

FOR PLANNING YOUR LIFE WITH "PERT"

PURPOSES:
1. TO THINK THROUGH MY DIRECTIONS IN LIFE AND SELECT MEANINGFUL GOALS.
2. TO PLAN HOW TO REACH THOSE GOALS.
3. TO ESTABLISH MILESTONES WHICH WILL TELL ME THAT I HAVE MOVED TOWARD MY GOALS OR THAT WILL HELP ME REEVALUATE MY GOALS.
4. TO HELP ME LEARN TO EVALUATE MYSELF AND MY PERFORMANCE.

WHAT DO I WANT OUT OF LIFE?

GENERAL OR SPECIFIC KIND OF WORK I WANT TO DO ALL MY LIFE.

WHAT KIND OF WORK CONDITIONS DO I NEED?

HOW MUCH INCOME WILL I NEED?

I WILL NEED TO ACQUIRE EDUCATION AND TRAINING AS FOLLOWS:

BEFORE I CAN ENTER A TRAINING AND/OR EDUCATION PROGRAM, I WILL NEED THIS PREPARATION:

(PERT BASIC DATA FORM)

THESE ARE THE OTHER HURDLES I MUST FACE IN PREPARATION FOR REACHING MY GOALS:	MY ASSETS ARE:	MY LIABILITIES ARE:

UNIT XIII - CAREERS IN MARKETING
Part 1 - Survey of Distributive Occupations
Activity 4

PERT GROUP PROJECT OUTLINE

I. Steps in doing a group research project (Brainstorm)
   A. List and assign event numbers using Program Planning Form (Activity 5)
      1. Start
      2. Topic selected
      3. Project goals selected
      4. Research - School library
      5. Research - Public library
      6. Interview
      7. Interview
      8. Interview
      9. Notes compiled
      10. Outline rough draft
      11. Complete research
      12. Rough draft completed
      13. Final copy types
      14. Copies duplicated
      15. Group presentation to class

1-15, events on critical path chart Activity #6

   B. Construct PERT Chart (Activity 6)
      1. Critical Path
      2. Determine number of days to complete each step.

UNIT XIII - CAREERS IN MARKETING
Part 1 - Survey of Distributive Occupations
Activity 5

PROGRAM PLANNING

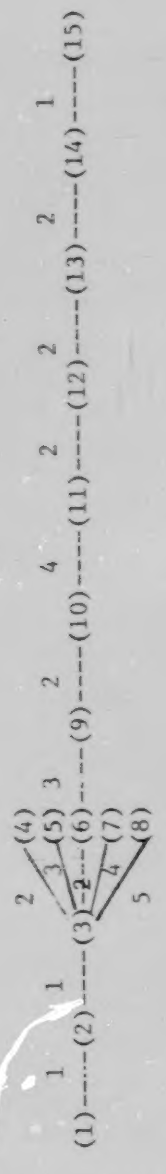
Event Number	Work Activity

UNIT XIII - CAREERS IN MARKETING

Part 1 - Survey of Distributive Occupations

Activity 6 - PERT Critical Path Chart

23 days - critical Path
to complete project


(1)
1
(2)
1
(3)
2
(4)
3
(5)
2
(6)
4
(7)
5
(8)
3
(9)
2
(10)
4
(11)
2
(12)
2
(13)
2
(14)
1
(15)

(1) - Event

2

( )----( ) - Number of days

UNIT XIII - CAREERS IN MARKETING
Part 2 - Using Career Information Materials

Length: Open

Prerequisite: None

Description: Introduction and use of materials on careers in marketing.

Objectives: At the completion of this lesson the student will be able to identify and use available information on careers in marketing.

Sources:
Occpational Outlook Handbook, 1972-73 Edition.
Dictionary of Occupational Titles, (DOT), Vol. I and II.
Careers in Marketing, Bikkie, 1971, page 17-30.
PEPI, Units XI, XII, XIII.

OUTLINE

I. Types of Material Available
  A. Consider many types of materials
    1. Books, pamphlets, etc.
    2. Films, Filmstrips, etc.
    3. Newspapers, magazines, etc.
  B. Government Publications
    1. Occupational Outlook Handbook
    2. Dictionary of Occupational Titles
    3. Other Federal and State materials
  C. Local Sources
    1. School and public library
    2. Government offices, Federal, State
    3. Other schools; community college, private, etc.
II. How to Use Career Information Materials
  A. What and where to look
  B. Note taking
  C. Types of reports
III. Using the Dictionary of Occupational Titles (DOT)
  A. Introduction to Volume I
  B. Job Definitions
  C. Occupational Classification and Code
    1. Arrangement and Use
    2. How to locate a job definition and code
    3. Use of dictionary
  D. Introduction to Volume II
    1. Occupational Categories

    2. Two-digit occupational division
    3. Three-digit occupational groups
    4. Use of special sections, Index, etc.
- E. Introduction of Supplement
    1. Purpose
    2. Explanation of Appendix
    3. How to use

ACTIVITIES

1. Complete Activity 1 or a similar Occupation Interest Analysis.

UNIT XIII - CAREERS IN MARKETING
Part 2 - Using Career Information Materials
Activity 1

OCCUPATIONAL INTEREST ANALYSIS[1]

1. Identify four job titles and DOT codes.

2. Select one DOT code and job definition from the above job titles.

3. What do the last three digits of the DOT code tell you about aptitude requirements for data, people and things for this job?

4. What are the characteristics of this job choice in respect to:

   a. Physical demands

   b. Working conditions

   c. Training time

5. What are the education and training requirements for this occupation?

6. What is the occupational outlook for this job choice in marketing?

---

[1] Careers in Marketing, Bikkie, 1971, page 30

UNIT XIII - CAREERS IN MARKETING

Part 3 - Determining Job Aptitude

Length: Open

Prerequisite: A tentative career goal in marketing.

Objectives: At the completion of this lesson the student will prepare a self-evaluation analysis to evaluate his competencies for employment in marketing.

Sources:
Careers in Marketing, Bikkie, page 1-16.
A First Look At Distribution, State Office, page 111-143.
You and Your Job, Blackledge, page 12-18.
Participation Experience Project Ideas (PEPI), page 60-66.

OUTLINE

- I. The World of Marketing
  - A. Marketing activities
  - B. Defined
- II. Aptitude
  - A. Defined
  - B. Aptitude Classifications
  - C. Aptitude Levels
- III. Intelligence
- IV. Personality
- V. Abilities
- VI. Physical Capacities

ACTIVITIES

1. Complete a self-evaluation analysis. PEPI includes a six page section on self-appraisals, beginning on page 60.
2. Arrange for a personal student-teacher interview to review the students self-analysis.
3. Discuss the relationship of your aptitudes and tentative career goals with your parents, friends, etc.
4. Student may want to consider taking an aptitude test and/or interest survey. Teacher and counselor should be consulted to determine what test would be most beneficial to the student.

UNIT XIII - CAREERS IN MARKETING
Part 4 - Career Opportunities

Length: Open

Prerequisite: Completion of Parts 1, 2, and 3.

Description: The student will have an opportunity to use PERT in the completion of an individual research project on a career of his choice.

Objective: At the completion of this lesson the student will have completed an individual examination of his career choice.

Sources: PERT Activities # 2-6, from Part 1 of this unit.

OUTLINE

I. Review the six distributive occupational clusters
  A. Financial Service Occupations
  B. Retail Occupations
  C. Sales Occupations
  D. Sales-Supporting Occupations
  E. Service Occupations
  F. Wholesale Occupations
II. Individual Student Project
  A. Explanation of activity (Activity 1)
    1. Selection of occupation
    2. Student-Coordinator conference
    3. PERT Plan

ACTIVITIES

1. Individual - Complete a written report on a selected career in marketing. Follow the "Career Opportunities" outline and use the PERT information to complete this project.

UNIT XIII - CAREERS IN MARKETING
Part 4 - Career Opportunities
Activity 1

CAREER OPPORTUNITIES

The purpose of this project is to provide an opportunity for you to closely examine one possible career.

PROCEDURES

I. Select a job--barber, beautician, small store owner, manager, insurance salesman, exporter, importer, wholesaler, market manager, stock broker, food service, business teacher, buyer, real estate sales, service-station operator, grocery store employee, display man, advertising person, etc.; training program--Sears, Penney, Boeing,etc.

II. Before you start your research, discuss with me the occupation chosen.

III. Prepare a PERT Plan for the completion of this project.

IV. Prepare a written presentation to the class, this presentation should contain:
  a. specific job
  b. educational requirements
  c. skills required
  d. special requirements--age, sex, height, health, etc.
  e. wages--starting and potential
  f. characteristics of the job
    1. hours
    2. advantages of the job over other jobs
    3. disadvantages of the job in relation to others
    4. type of work done
    5. human characteristics desired for this job
    6. human characteristics not desired for this job
    7. regulations--dress, appearance, etc.
    8. Typical problems encountered on this job
    9. vacations and other fringe benefits
    10. availability of this job
    11. related fields

V. Your report must contain the above items, but you are not limited to these alone.

VI. Your written report must contain a PERT Plan showing the steps and time involved in reaching your occupational goal.

VII. Use at least five sources (people, books, magazines, articles, college catalogues, etc.).

UNIT XIV

BUSINESS OPERATIONS

Part 1 Channels of Distribution

2 Business Organizational Concepts

3 Functional Organizations

4 Physical Organization - Fixtures and Equipment

5 Physical Organizations - Location

6 Physical Organization - The Plant

7 Financing A Business

8 Business Ownership

UNIT XIV - BUSINESS OPERATIONS
Part 1 - Channels of Distribution

Length: Open

Prerequisite: Finish Unit on types of Distributive Enterprises.

Description: A study of the movement of consumer goods from producer to ultimate consumer.

Objectives: On completion of this lesson the student will be able to:

1. Given a piece of merchandise such as a dress, shirt, a pair of shoes, will be able to trace its movement from producer to ultimate consumer making as many changes of ownership as possible in the basic structure of distribution channels; explain the function of each change of ownership and its effect on the price.
2. Define:
   Wholesaler, Retailer, Manufacturers' Agent, Broker and Jobber.

Sources:
Marketing and Distribution, Mason-Rath, page 212-224.
Business Principles and Management, 4th Ed., Shilt-Wilson, page 368-380.
Business Principles, Organization and Management, 2nd Ed., Tone-Simson, page 75-77.
Retail Merchandise, 5th Ed., Wingate-Samson, page 22-27.
Retailing Principles and Practice, 5th Ed., Richert-Meyer, page 13-16.

OUTLINE

I. Manufacturer-- Consumer
   (Ownership goes directly from producer to ultimate consumer).
   A. Factory sales
   B. Mail order
   C. Merchandise clubs
   D. Door-to-door
   E. Route selling
II. Manufacturer-- Retailer-- Consumer
   (3 transfers of ownership)
   A. Shopping or fashion goods
      1. Selection on basis of comparison
      2. Speed essential
      3. Lower cost of no middle-men
   B. Industrial goods
III. Manufacturer-- Wholesaler-- Retailer-- Consumer
   (4 changes of ownership)

A. Buy in large quantities--sell to many in small quantities
   1. Availability
   2. Manufacturer gets wider distribution
   3. Retailer deals with fewer contacts for wider variety of goods

IV. Manufacturer-- Agent Middle-Man-- Wholesaler-- Retailer-- Consumer (6 or more changes of ownership)
   A. Agent Middle-man
      1. commission merchant
      2. broker
      3. manufacturer's agent
      4. jobber

ACTIVITIES

1. Ed Peters is a whole sale supplier of eggs and dairy products. One of his customers, the owner of a small grocery store on the edge of town, tells him that from now on he is going to buy his eggs from a farmer at 5 ¢ a dozen less. Ed knows the farmer does not always offer the best quality eggs nor will he have steady supply nor will he be able to extend credit. How should Ed explain the advantages of an established wholesaler in order to save his customer.

2. Use a form similar to the one below and place a check in the appropriate column for each of the following types of business (Instructor to name the business)

   Auto Parts Dealer
   Grocery Store
   Building Supplier
   Confectionary Dealer
   Drug Store
   Etc.

Type of Business	Wholesaler	Retailer	Both

UNIT XIV - BUSINESS OPERATIONS

Part 2 - Business Organizational Concepts

Length: Open

Instructors Note: Businesses fail more often from lack of organization than any other cause. If new people are to be encouraged to go into business they should be able to recognize the techniques of a well organized business and be able to use and/or understand the importance of organization when working for or running a business.

Prerequisite: Introduction by means of lecture and class discussion on the organization concept (see outline) and characteristics of a good organization.

Description: An introduction to the functional concept of business organization. Necessary before student can go on to individual or group studies of functional organization.

Objectives: On completion of this lesson, the student will be able to:

1. Differentiate between functional and physical organization.
2. State the concept of business organization.
3. Name 6 characteristics of a good organization.
4. Differentiate between Line organization and Line and Staff organization methods
5. Explain what is meant by "charting" an organization.
6. Justify organization charting and explain its weaknesses.

Sources:

Business Principles and Management, Shilt-Wilson, 4th Ed., page 87-99
Retailing Principles and Practices, Richert-Meyer, 5th Ed., page 75-80
Business Principles, Organization and Management, Tonne-Simon, 2nd Ed., page 53-57.
Fundamentals of Selling, Wingate- Nolan, 9th Ed., page 221.
Transparencies on organization charts.

OUTLINE

I. Organization Concept
   A. Systematic arrangement of people, jobs and functions into an efficient operation.
   B. Characteristics of a good organization
   C. Types of Organization
      1. Line organization
      2. Functional type of organization
      3. Line and Staff organization
   D. Management Styles
      1. Paternalistic
      2. Bureaucratic
      3. Participative

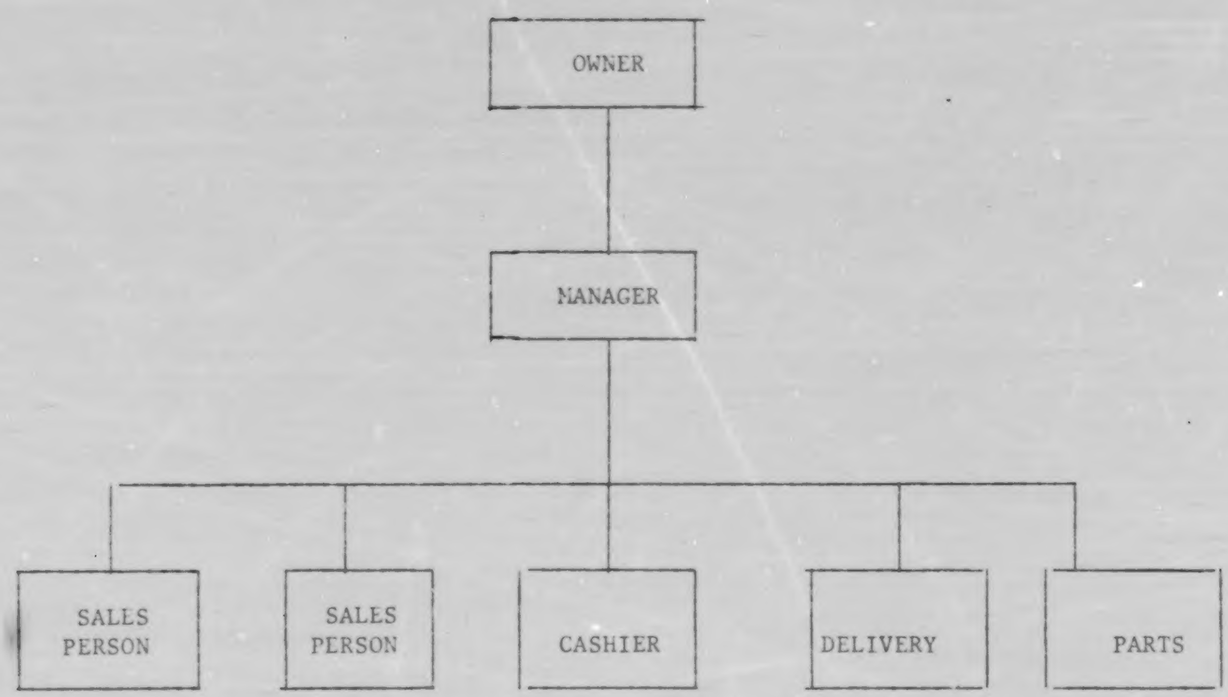
II. Divisions of Organization
   A. Functional
      1. Determine WHAT to be done-WHO is to do it-and WHEN it is to be done.
   B. Physical
      1. Housing, location, fixtures and supplies

ACTIVITIES

1. You and two friends (select names) plan to start a retail clothing business. Draw an organizational chart, indicating responsibilities and functions that will be performed. Use the three names (including your own) and two associates.
2. Care Problems
   Three partners, Brady, Thornton, and Marshall, operate a garage in which they sell automobiles, operate a service station, and operate a repair shop. All three partners do the buying and selling. They all quote allowances on trade-ins. They all give instructions to the men in the repair shop. They alternate in keeping records. The banking is done by one of the partners.
   a. critisize the buying procedure
   b. critisize the procedure on quoting on trade-ins.
   c. critisize the supervision
   d. critisize the method of bookkeeping
   e. Draw up an organizational chart with an explanation of how you think the business should be operated.

UNIT XIV - BUSINESS OPERATIONS
Part 2 - Business Organizational Concepts
Activity 1

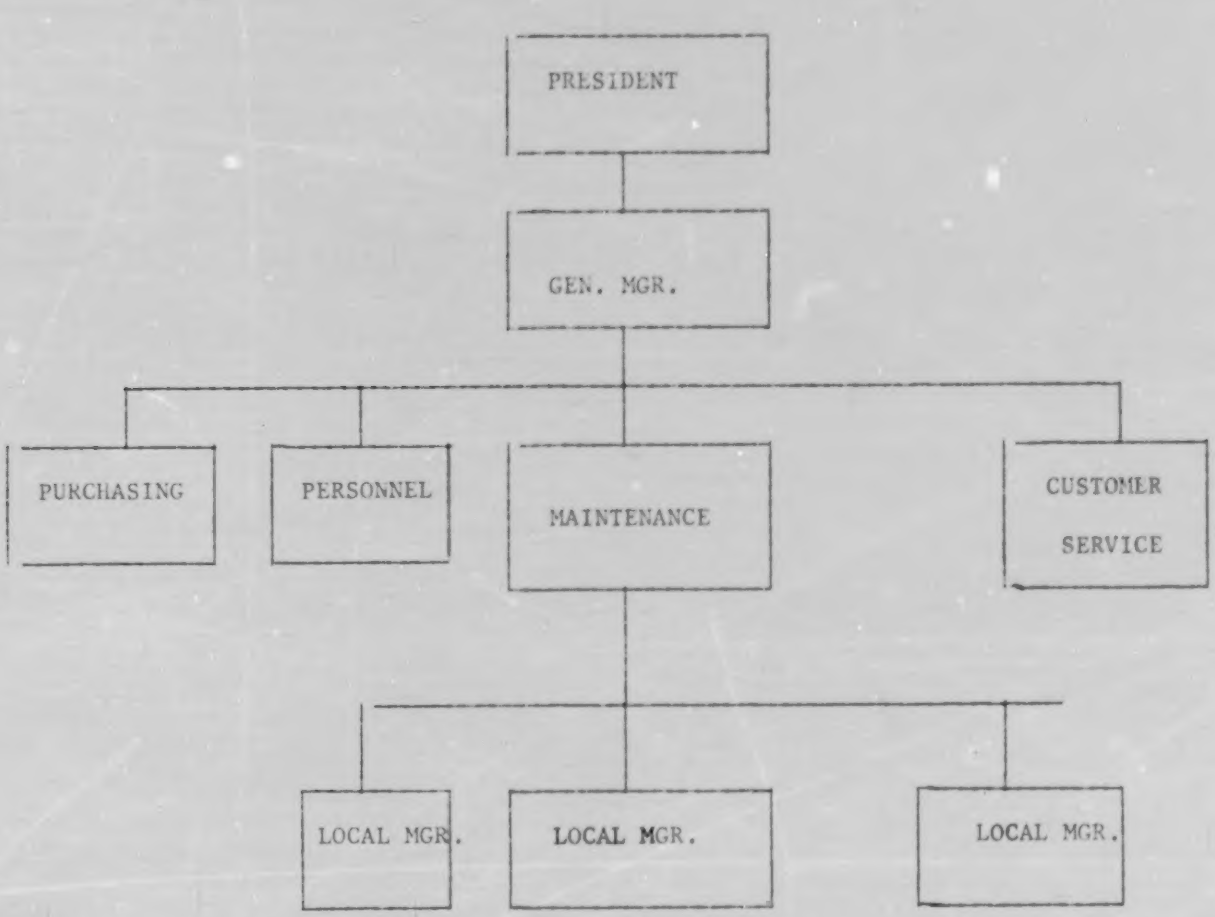
LINE TYPE ORGANIZATION--Direct Authority


OWNER
MANAGER
SALES PERSON
SALES PERSON
CASHIER
DELIVERY
PARTS

UNIT XIV - BUSINESS OPERATIONS
Part 2 - Business Organizational Concepts
Activity 2

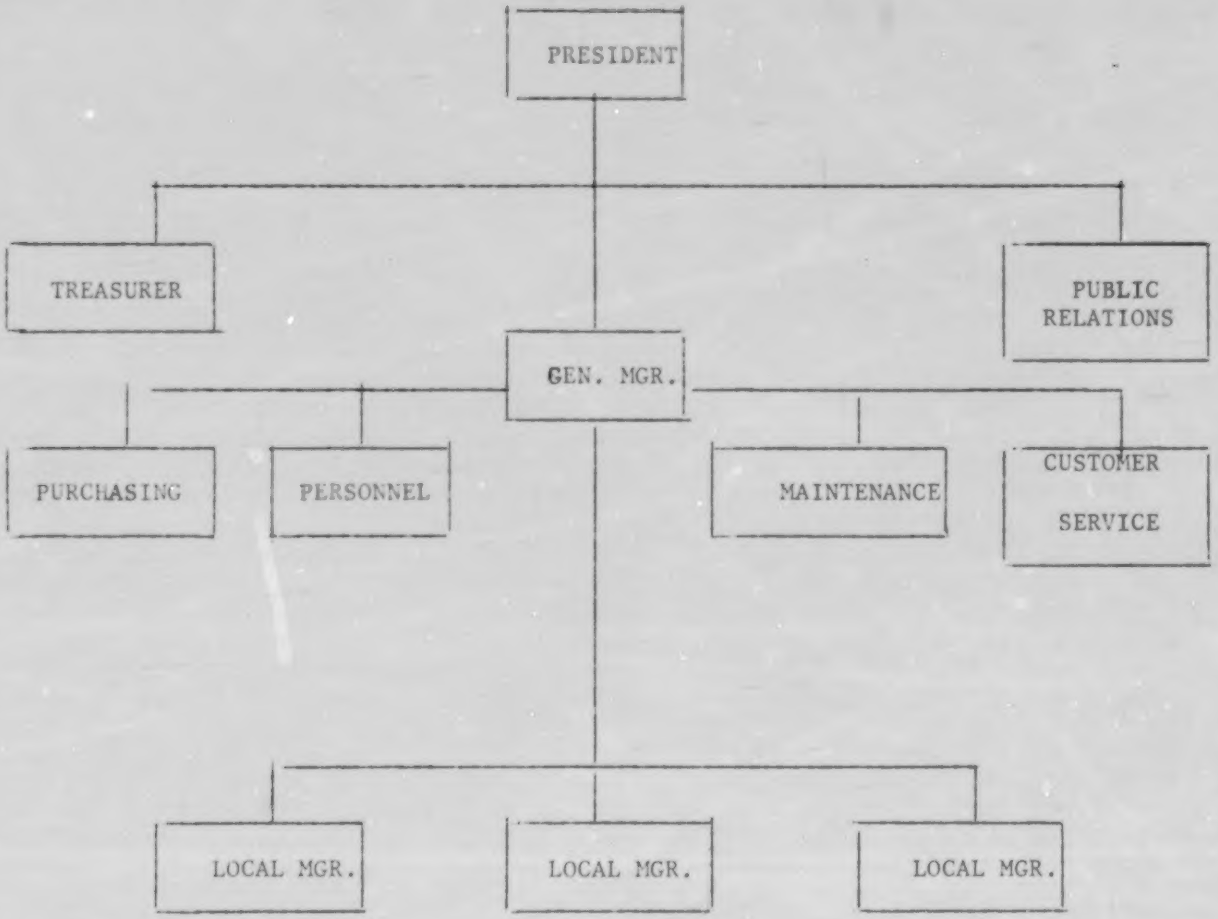
FUNCTIONAL ORGANIZATION

Specialist Centered--Diffused Authority


PRESIDENT
GEN. MGR.
PURCHASING
PERSONNEL
MAINTENANCE
CUSTOMER SERVICE
LOCAL MGR.
LOCAL MGR.
LOCAL MGR.

LINE AND STAFF ORGANIZATION

Direct Authority--Aided by Specialists


PRESIDENT
TREASURER
PUBLIC RELATIONS
GEN. MGR.
PURCHASING
PERSONNEL
MAINTENANCE
CUSTOMER SERVICE
LOCAL MGR.
LOCAL MGR.
LOCAL MGR.

UNIT XIV - BUSINESS OPERATIONS
Part 3 - Functional Organizations

Length:	Open
Prerequisite:	Completion of Parts 1 and 2 of this unit.
Description:	A study of the functions and breakdown of duties within each of the 5 main divisions of functional organizations of a business.
Objectives:	On completion of this lesson, the student will be able to: 1. State in as few words as possible the function of each dept. 2. Chart the chain of command of each division when given the number of employees. 3. Make a master chart of organization of all divisions together.
Sources:	Retailing Principles and Practice, 5th Ed., Richert-Meyers, page 75-78. Basic Retailing and Distribution, 2nd Ed., Reich-Levy, page 173-176, and 312-319. Marketing and Distribution, 1968, Mason-Rath, page 167-180, 368-371. Business Principles and Management, 4th Ed., Shilt-Wilson, page 270-72, 453-465, 469-486, 489-506, 557-559. Retail Merchandising, 7th Ed., Wingate-Samson, page 135-136, 316, 459-462, 484-486, 498-500, 502, 506. Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 231,224, 286.

OUTLINE

Divisions of Business Organization (Activity #1)

I. Merchandise Division
   Function____
      Specific
      a.
      b. etc.

II. Sales Promotion (Publicity)
   Function____
      Specific
      a.
      b. etc.

III. Maintenance Division
   Function____
      Specific
      a.
      b. etc.

7

IV. Personnel Division

Function____

Specific
a.
b. etc.

V. Control and Finance Division

Function____

Specific
a.
b. etc.

ACTIVITIES

1. By using information sources given with this unit, fill in the outline as shown. You may find authors with slightly different divisions of duties and titles. You decide which has more meaning for you and change the outline as you will. Be sure all areas are covered.
2. Make an appointment to interview the publicity manager of a large business in your area. You may form a committee of not more than 5 or go on your own. More businesses could be contacted using the committee approach. Find out:
   - a. Number of personnel in promotion division
   - b. Types of promotion used (promotional plan)
   - c. Store wide (company wide) promotions
   - d. Special events
   - e. Variety of media used by company
   - f. Do they do their own art work or farm it out.
   - g. Write up your results and feed back to class by means of a panel discussion.
3. Invite a personnel manager of a large business to speak to the class. Find out by listening and questions the general overall duties of the personnel department.
4. Plan a field trip to a large department store. The trip plan should include the stockroom receiving and marking, maintenance division, promotion department and finance and control. Write up what you observed about activities going on. Do they agree with your outline as you set it up? Revise outline if you wish in light of field trip results.
5. Invite a merchandise manager or a buyer of a dept. store to speak to the class. Have prepared a set of questions you would like him to answer.
6. Plan an interview with a merchandise manager of a variety store, dept. store, wholesale business, specialty store, grocery store. (This could be a group project - 6 stores - 6 students, etc.)

(No. 6 Con.)

Find Out:

a. What type of inventories they take
b. How often
c. Kind of forms used for inventory (bring one back)
d. Any other methods of stock control used

Pool results as a group and make an oral report to class.

7. Continuing project
    a. Chart duties of all divisions of an organization:

Personnel	Merchandising	Publicity	Maintenance	Finance & Control

UNIT XIV - BUSINESS OPERATIONS
Part 4 - Physical Organization - Fixtures & Equipment

Length: Open

Prerequisite: Previous Parts on physical organization; "Location" and "The Plant"

Description: A study of fixtures and equipment needed for a good operation.

Objectives: On completion of this lesson, the student will be able to:
1. Name several common functions of all store fixtures.
2. Describe 5 kinds of lighting systems.
3. Choose equipment for a given store (Starting Your Own Business).
4. Name 5 advantages for good lighting for a business.

Sources: Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 435-439.
Retail Merchandising, 7th Ed., Wingate-Samson, page 90-96.

OUTLINE

Fixtures and Equipment
- I. Factors to consider
  - A. Custom vs. standard
  - B. New trends
  - C. Flexability
  - D. Maintenance
  - E. Appearance
  - F. Clientele
  - G. Security
- II. Types of equipment
  - A. Selling equipment
  - B. Non-selling equipment
  - C. Building equipment

ACTIVITIES

1. Discuss this statement "Expensive fixtures and equipment are not as attractive to consumers as are low prices for merchandise".

2. Make as complete a list as you can of all equipment needed for your store (Starting Your Own Business)
   Classify as to:
   - a. Selling equipment
   - b. Non-selling equipment
   - c. Building equipment

UNIT XIV - BUSINESS OPERATIONS
Part 5 - Physical Organization - Location

Length: Open

Prerequisite:
1. Participation in class discussion and activities in unit on Business Organization. Completion of unit A on Functional Organization.
2. Class discussion of the term physical organization.

Description: A study of the problems and factors to consider in the location of any business.

Objectives: On completion of this lesson, the student will be able to:
1. Select a site for a specific business and defend the selection with facts and reasons. Consider the city, the area within the city and the specific site.
2. Identify on a city map the following retail structures:
   a. String street
   b. Neighborhood shopping
   c. Central shopping
   d. Secondary shopping
   e. Fringe areas

Sources:
Retail Merchandising, 7th Ed., Wingate-Samson, page 76-83.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 432-433.
Business Principles and Management, 4th Ed., Shilt-Wilson, page 136.
Basic Retailing and Distribution, 2nd Ed., Reich-Lang-Fieldman, page 407-409.

OUTLINE

Location
- I. Types of location
  - A. Selecting the city
  - B. Selecting the area within the city
  - C. Specific site within area
- II. Factors affecting choice
  - A. City
    - 1. Population
    - 2. Trends of population
    - 3. Competition
    - 4. Income
    - 5. Industrial activity

6. Transportation
7. Labor market
8. Advertising media
9. State and local legislation
10. Personal consideration

B. Site within city
   1. Competition
   2. City retail structure (shopping districts)
   3. Buying habits
   4. Traffic patterns
   5. Accessibility

C. Specific site
   1. Side of street
   2. Corner or mid block
   3. Parking
   4. Location of competitors
   5. Availability and cost

ACTIVITIES

1. Get a map of your city and locate the types of shopping areas. Use a different color for each one. List the businesses in each one. Can you draw a conclusion as to type of business found in each?
2. Assume you are starting a business of TV and radio repair. What city would you select? Why? What area within the city would you select? Why? Finally, what specific site would you select? Why?
3. What transportation and parking facilities are available to the central shopping district of your city? Are they adequate? What plans for improvement have been made? Use newspapers or interviews.
4. What advertising media is available in your city? What advertising agencies? Sign companies, printing companies, etc.
5. Do some reading on labor conditions in your area. Use the library, newspapers and magazines. Make a comparison of labor costs of your city with another city in another state. How would this information affect your decision on location?
6. Make a study of zoning restrictions of your city. It might be possible to attend a city council meeting. Be sure to check agenda to see if zoning is to come up for discussion.

UNIT XIV - BUSINESS OPERATIONS
Part 6 - Physical Organization - The Plant

Length: Open

Prerequisite: Completion of Part 5.

Description: A study of all the factors that need to be considered in planning the building for a business.

Objectives: On completion of this lesson, the student will be able to:

1. Design a plant for a specific business showing all the factors consistant with that business.
2. Name the 5 factors that determine the choice of a building.
3. Name at least 4 out of 5 things you must know before starting the floor plan.

Sources: Retail Merchandising, 7th Ed., Wingate- Samson, page 84-102.
Retailing Principles and Practices, 5th Ed., Richert-Hayes, page 435-443.
Basic Retailing and Distribution, 2nd Ed., Reich-Feildman, page 409.

OUTLINE

The Plant

- I. Selection
  - A. Appearance
  - B. Size
  - C. Construction
  - D. Expansion possibilities
  - E. Cost - (buy-rent-build)
- II. Exterior
  - A. Style
  - B. Display windows
  - C. Receiving and delivery
  - D. Sign
- III. Interior
  - A. Floor space
  - B. Lighting
  - C. Color harmony
  - D. Elevator and stairs
  - E. Aisles
- IV. Layout
  - A. Objectives to good layout

B. Factors to consider
   1. Clientele
   2. Kind and amount of merchandise
   3. Permanent facilities
   4. Size and shape
   5. Heat, light and ventilation

C. Steps in developing layout
   1. Classify merchandise
   2. Traffic floor
   3. Space allotment
   4. Department locations
   5. Non-selling space

ACTIVITIES

1. Continuing project - "Starting Your Own Business". Draw to scale the plan of the lot site and location of building. Show entrances and windows, parking lot and receiving facilities.
2. Design your store front (as for #1) to scale showing entire front, materials, display window, store sign, etc.
3. Using magazine advertisements, make a collection of pictures(color) to show interiors of business. How important is good color harmonies to business?
4. Draw the floor plan of the entire plant. Be sure it is to scale. Take into consideration the objectives of a good layout and the 5 factors to consider before you can settle on a floor plan.
5. Make a survey of a business in your community similar to the one you are planning. Criticize as to the building, the front, the sign, and the layout.

UNIT XIV - BUSINESS OPERATIONS
Part 7 - Financing A Business

Length: Open

Prerequisite: None

Description: A study of methods of raising money in order to finance a business.

Objectives: On completion of this lesson, a student will be able to:

1. Determine the total amount of capital needed and have a workable distribution of this capital.
2. Define bond, equity capital, stock, collateral, working capital.
3. Name at least three financial institutions as sources of capital.

Sources:

Retail Merchandise, 7th Ed., Wingate-Samson, page 117-121, 122-126.
Marketing and Distribution, 1968, Mason-Rath, page 346-354.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 415.
Basic Retailing and Distribution, 2nd Ed., Reich-Levy, page 406.
Business Principles, Organization and Management, 2nd Ed., Tonne-Simon, page 46-48.
Business Principles and Management, 4th Ed., Shilt-Wilson, page 201-215.

Small Business Administration Pamphlets.

OUTLINE

Financing A Business

- I. Determining capital needed
  - A. Consulting firms
    - 1. Banks
    - 2. Accountants
    - 3. Lawyers
  - B. Forecasting needs
    - 1. Budget
    - 2. Estimating income
    - 3. Type of business
      - a. Merchandise
      - b. Equipment
      - c. Ownership
      - d. Volume
      - e. Services given
- II. Sources of capital
  - A. Individual savings

B. Buying on credit (see unit on credit and banking)
   1. Terms
C. Personal loans
D. Finance companies
   1. Will want to know:
      a. Character of borrower
      b. Purpose of loan
      c. Security
      d. Managerial ability
      e. Conditions
E. Partners
F. Corporate financing
   1. Stock
G. Small business administration

ACTIVITIES

1. To become aware of possible sources of capital in your community, prepare a form similar to one below. In the yellow pages of the telephone book, locate as many classification headings as you can that are related to financial institutions and saving capital.

Yellow Page Heading	Credit Source (Actual Business)

2. Invite an accountant to speak to the class and find out:
   a. business expenses such as state and local taxes, rents, license fees, etc.
3. Arrange to make a visit, along with several other members of your class, to the business loan department of a bank, loan association, or other financial institution. Call for appointment and explain purpose of your visit. Compile a list of questions you will ask. The group should report all information to class.
4. Horace Matz started a lumber and building materials business. He invested $20,000 of his own money and borrowed $5,000. He bought $1,000 worth of equipment and purchased $23,000 worth of merchandise which he maintained at this level. His sales for the first 2 years amounted to $45,000, but he was always short of cash and had a hard time to pay his bills.
   a. What do you think are some of his difficulties?
   b. What can he do to remedy his difficulties?

UNIT XIV - BUSINESS OPERATIONS
Part 8 - Business Ownership

Length: Open

Prerequisite: None

Description: A study of 5 types of business classified by ownership.

Objectives: On completion of this lesson, a student will be able to:

1. List and define 5 types of ownership.
2. Give advantages and disadvantages of each 5 types.
3. Define stockholder.
4. Determine type of ownership best suited to protect private property from attachement.
5. Explain the ownership organization of his training station.

Sources:

Business Principles and Management, 4th Ed., Shilt-Wilson, page 57-64.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 65-67.
Business Principles, Organization and Management, 2nd Ed., Tonne-Simon, page 16-25, 29, 41, 232.
Retail Merchandising, 7th Ed., Wingate-Samson, page 478, 64-67.

- Corporations -

Business Principles and Management 4th Ed., Shilt-Wilson, page 75-78 and 280.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 37, 67-69.
Business Principles, Organization and Management, 2nd Ed., Tonne-Simon, page 29-41.
Retail Merchandising, 7th Ed., Wingate-Samson, page 74-69.

- Co-Operatives -

Business Principles and Management, 4th Ed., Shilt-Wilson, page 79-83.
Retailing Principles, Organization and Management, 2nd Ed., Tonne-Simon, page 41, 83.
Retail Merchandising, 7th Ed., Wingate-Samson, page 60-63.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 38, 40.

- Franchise -

Business Principles and Management, 4th Ed., Shilt-Wilson, page 7,25
Consumer Economics Problems, Warmke-Wylle, page 58-242.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 40.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 70, 549-551.
Business Principles, Organization and Management, 2nd Ed., Tonne-Simon, page 86.
1970 Project on Franchise, Source by Council.

OUTLINE

Types of Business Ownerships

- I. Sole Proprietorship
  - A. Advantages
    - 1. Own boss
    - 2. Receive all profit
    - 3. Easy to organize - less red tape
    - 4. Taxes lower
    - 5. More personal contact with customers
    - 6. No legal organization requirements
  - B. Disadvantages
    - 1. Unlimited personal liability
    - 2. Limited funds
    - 3. Limited abilities
    - 4. Death or illness closes business
- II. Partnership
  - A. Advantages
    - 1. Greater availability of capital
    - 2. Partners share voice in management
    - 3. Lower taxes and less regulation than corporate forms of ownership.
    - 4. Credit improved.
  - B. Disadvantages
    - 1. Unlimited financial liability
    - 2. Possible disagreement
    - 3. Business terminates upon death or withdrawal of partner
    - 4. One partner can bind others by his actions.
- III. Corporations
  - A. Characteristics
    - 1. Owned by stockholders
    - 2. Operated by Board of Directors
    - 3. Officers appointed by Board
    - 4. Officers run the business.
  - B. Advantages
    - 1. Continued existence
    - 2. Can hire "experts"
    - 3. Greater availability of capital
    - 4. Easy for individual to withdraw by selling stock
    - 5. Limited liability of stockholders
  - C. Disadvantages
    - 1. More difficult to establish
    - 2. Subjected to more government red tape
    - 3. Requires payment of filing fees and capital stock taxes.
    - 4. Charter restrictions
    - 5. Lack of personal interest
    - 6. Expensive operation
- IV. Co-Operatives
  - A. Business owned and operated by its members
    - 1. State charter
    - 2. Services rendered
    - 3. Profits distributed among members.

        4. Growth of cooperatives
        5. Attitude of other businesses toward cooperatives
    B. Types of Cooperatives
        1. Consumer
            a. Farmers
            b. Housewives, etc.
        2. Retail cooperatives
            a. Groceries
            b. Gift shops
            c. Service stations
            d. General stores
        3. Service Cooperatives
            a. Credit unions
            b. Rural electric groups
            c. Telephone
            d. Housing
            e. Insurance
            f. College student organizations
        4. Wholesale cooperatives
            a. Generally very large
            b. Produce products (5 regional associations of cooperatives refinery own 500 oil wells)
        5. Produce cooperatives
            a. Workers own and operate a plant
            b. Example: dairy herd improvement
            c. Association and irrigation company
V. Franchise Operations
    A. Definition: Exclusive rights given by one business to another such as:
        1. Trade names
        2. Exclusive territory
        3. Selling certain products
    B. Common franchise operations
        1. Food
        2. Motels
        3. Gasoline stations
        4. Dance studios
        5. Specific products (Schwinn bicycle for example)
    C. Advantages of Franchise

ACTIVITIES

Partnership

1. Assume that Taylor, Black and Keats invested $10,000 $15,000 and $20,000 respectively in a partnership.
    a. If the partnership agreement provided that the profits are to be divided in the ratio of their investment, how should profits of $8,000 be divided?
    b. If the partnership agreement provided that each partner was to receive 6% interest on his investment and the remainder of the profits were to be divided equally, how much should each partner receive of the profit in a certain year with profits of $9,900?

Corportation

1. Assume that you and four other classmates decide to form a corporation. Write the articles of incorporation.
2. Investigate the requirements in your state for:
   a. Organizing a corporation
   b. Obtaining a charter
   c. Selling and issuing stock
   d. Making reports
   Use school and city library
3. Obtain copies of a corporations annual report. Study the contents and list the kind of information that is included.

Sole Proprietorship and Partnership

1. Prepare to present orally or write a paper on the subject "With the trend toward large scale business today, do you think there is any chance that small scale retailing establishments will disappear?". Explain your answer.
2. Make a list of 5 enterprises in your community that are single proprietorships. Name 5 that are partners. Why do you think they are so organized?

Franchise

1. Read as much as you can on franchises (see bibliography with this unit as well as school and city library). Prepare a report for the class.
2. Make a trip to Chamber of Commerce to get names of franchise businesses in your community. Plan an interview and find out:
   a. What is his territory
   b. Advantages and disadvantages of franchising
   c. Who is the company controlling the franchise
   d. How does anyone go about getting a franchise
   e. Are there any local or state regulations

Cooperatives

1. The net profits of a retail cooperative is \$2,000 and the purchases made by members amount to \$50,000. If the profit is divided in proportion to the purchases, how much should be given to a member who made purchases of \$500.
2. Assume you were given the task of setting up for your school a cooperative store
   a. How would you go about forming a board of directors
   b. What qualification would you expect from the manager
   c. What personnel would be required to operate the store
   d. Would membership in the cooperative be limited to students.

UNIT XV

TYPES OF DISTRIBUTIVE ENTERPRISES

Part 1 Retail-Direct Selling
2 Retail-General Store
3 Retail-Single Line and Speciality Stores
4 Retail-Department Stores
5 Retail-Chain Stores
6 Retail-Supermarkets
7 Retail-Convenience Stores
8 Retail-Discount Stores
9 Retail-Shopping Centers
10 Retail-Roadside Stands and Vending Machines
11 Personal Services
12 Wholesale

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 1 - Retail-Direct Selling

Length: Open

Prerequisite: None

Description: A study of direct selling-the advantages to the individual selling and the producer of the products sold.

Objectives: On completion of this unit the student will be able to:
1. Name 5 categories of direct selling and give examples of each in terms of merchandise and method.
2. Give one advantage in each of the 5 categories to the salesman, to the consumer, and to the producer.

Sources:
Business Principles, Organization and Management, 2nd Ed., Tonne-Simon, page 75.
Business Principles and Management, 4th Ed., Shilt-Simon, page 368-369
Retailing Principles and Practices, 5th Ed., Richert-Meyers
Marketing and Distribution, Mason-Rath, page 14, 16, 17, 138-139, 146-149, 189-194, 214, 412-413.
Retail Merchandising, 7th Ed., Wingate-Samson, page 23,39.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 51, 258-264.
Your Job in Distribution, Beaumont-Langan, page 23, 109, 115-116.
Salesmanship Fundamentals, 3rd Ed., Ernst-Duval, page 40, 167,181-182.
General Business for Economic Understanding, 1971, page 85-92.

OUTLINE

I. Direct Selling
  A. Categories
    1. Peddling
    2. Route Salesman
    3. Party or Club Plan
    4. Cold Canvassing
    5. Appointment method
  B. Advantages
    1. To the Salesman
    2. To the Producer
    3. To the Customer
  C. Problems

ACTIVITIES

1. Make a list of all merchandise you can think of in all five categories in your outline.

2. The following is to be a continuing project for all the Parts in this Unit. Make a chart of (1) advantages and disadvantages of each category, (2) type of merchandise and service offered.

Name of Business	Type of Store	Advantages	Disadv.	Merchandise	Services

3. Invite a salesman of the party or club plan to speak to your class and to demonstrate his method.

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 2 - Retail-General Store

Length: Open

Prerequisite: None

Description: A study of the General Store,its history and place in our economy.

Objectives: On completion of this study the student will be able to:
1. Define general store as to type of merchandise, ownership, and location.

Sources:
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 28.
Business Principles, Organization Mgt., 2nd Ed., Tonne-Simon, page 77-79.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 41.
Your Job in Distribution, Beaumont-Langan, page 75-76.

OUTLINE

I. General Stores
   A. History
   B. Location
   C. Types of Goods
   D. Ownership
   E. Future of

ACTIVITIES

1. With the help of other members of the class, the telephone book, and observations, make a list of all general stores in your locality.
2. Locate each on a city map. What is your conclusion as to location and customers served?
3. From your parents, grandparents or other adults, obtain information about stores in the community in which they grew up. Present the materials to class in a well-organized oral report.

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 3 - Retail-Single Line and Specialty Stores

Length: Open

Prerequisite: None

Description: A study of Single-Line and Specialty Stores

Objectives: On completion of this study, a student will be able to:

1. Identify at least 10 different types of Single-Line Stores based on merchandise carried.
2. Differentiate between Single-Line and Specialty Stores to those offered in Department Stores.

Sources:

Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 42-44.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 38-39.
Retail Merchandising, 7th Ed., Wingate-Samson, page 43-44.
Your Job in Distribution, Beaumont-Langan, page 101.
Business Principles, Organization, MGT., 2nd Ed., Tonne-Simon, page 63-64, 78.

OUTLINE

I. Single-Line and Speciality Stores
   - A. Definition of Each
   - B. Type of Merchandise
   - C. Location
   - D. Services Offered

ACTIVITIES

1. With the help of the telephone directory, make a list of Specialty Stores and Single-Line Stores in your area. Give the type of merchandise carried.
2. Add to the continuing chart of Stores (Part 1).

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 4 - Retail-Department Stores

Length: Open

Prerequisite: None

Description: A study of Department Stores in relation to goods carried and merchandising methods.

Objectives: At the completion of this study the student will be able to:
1. Define Department Store
2. Explain what is meant by departmentalized selling.
3. Define and give examples of leased departments.

Sources:
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 39.
Business Principles Organization and Mgt., 2nd Ed., Tonne-Simon, page 78.
Business Principles and Management, 4th Ed., Shilt-Wilson, page 170-171.
Retail Merchandising, 7th Ed., Wingate-Samson, page 62.
Your Job in Distribution, Beaumont-Langan, page 25-43, 90, 94-101.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 43.

OUTLINE

I. Department Stores
   A. Definition
   B. Types of Merchandise
   C. Services (No detail)
   D. Location
   E. Future of
   F. Leased Department

ACTIVITIES

1. Go to the largest Department Store in your area and by walking through the store, make a list of all the different departments.
2. Conduct an interview with the manager of a Leased Department and find out:
   A. Contract with store
   B. Advantages and disadvantages of leasing.
3. Add to continuing chart of stores. (Part 1)
4. Write a paper on the trends in Department Store selling.

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 5 - Retail-Chain Stores

Length: Open

Prerequisite: None

Description: A study of Chain Stores-growth characteristics and advantages and disadvantages of this type of enterprise.

Objectives: On completion of this unit a student will be able to:

1. Define a Chain Store
2. List the four types of Chain Stores
3. Give at least 3 advantages and 3 disadvantages of Chain Store operation.
4. Differentiate between services offered by Chain Stores, local Department Store, and General Stores.

Sources:
Business Principles, Organization and MGT., 2nd Ed., Tonn-Simon, page 79-434.
Retail Merchandising, 7th Ed., Wingate-Samson, page 61.
Retailing Principles & Practices, 5th Ed., Richert-Meyers, page 78-80,28, 37-38, 457-458.
Marketing and Distribution, Mason-Rath, 1968, page 157-159.
Your Job in Distribution Beaumont-Langan, page 90, 71-73, 105.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 369.

OUTLINE

- I. Chain Stores
    - A. Definition
    - B. Services Offered
    - C. Advantages
        - 1. Customer
        - 2. Management
    - D. Disadvantages
        - 1. Customer
        - 2. Management
            - (a) Government control
    - E. Types of Chains
        - 1. Local
        - 2. Sectional
        - 3. National
        - 4. Voluntary

ACTIVITIES

1. With the help of the telephone directory, make a list of stores with more than one outlet in your community. Classify as to local, regional, national or voluntary. It could be necessary that you make contacts with stores to find this information.
2. Add to continuing chart of stores. Include all four types of chains.

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 6 - Retail - Supermarkets

Length: Open

Prerequisite: None

Description: A study of Supermarkets--growth and trends

Objectives: On the completion of this study the student will be able to:

1. Define Supermarket.
2. Define mass merchandising.
3. List at least four problems in Supermarket operation.
4. Discuss intelligently the growth and trend of Supermarkets.

Sources:

Retail Merchandising, 7th Ed., Wingate-Samson, page 53-55.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 39, 272-273, 305-306.
Marketing and Distribution, Mason-Rath, 1968, page 163.
Your Job in Distribution, Beaumont-Langan, page 19-20, 68-78.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 44.
Trade Magazine--*Grocery Stores*, *Chain Store Age*,etc.

OUTLINE

I. Supermarket
  - A. Definition
  - B. Services Offered
  - C. Mass Merchandising
  - D. Size
  - E. Trends
  - F. Volume/Margin
  - G. Problems
    - 1. Management
    - 2. Customer

ACTIVITIES

1. Make a collection of pictures, or diagrams of layouts of Supermarkets. You might take your own picture of a Supermarket in your area. How do these illustrations fit in with the definition of Supermarkets?
2. Write a paper on trends and problems of Supermarket operation.
3. Invite a manager of a Supermarket to speak to the class.

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 7 - Retail-Convenience Stores

Length: Open

Prerequisite: None

Description: A study of Convenience Stores, what they are, growth and opportunities.

Objectives: On completion of this unit the student will be able to:
1. Define Convenience Stores
2. Analyze the reason why Convenience Stores have become so popular
3. Contrast Convenience Stores with Supermarkets on
   (a) size (b) services (c) location (d) merchandise

Sources: Marketing and Distribution, Mason-Rath, 1968, page 164.
Your Job in Distribution, Beaumont-Langan, page 66,71,72.
Trade Magazines--Chain Store Age, Progressive Grocery.

OUTLINE

I. Convenience Stores
   A. What are They?
   B. Services
   C. Size
      1. in square feet
      2. parking lots

Approximately

   D. Prices
   E. Type of Merchandise
      1. Variety
   F. Growth--Trend

ACTIVITIES

1. Add to continuing Chart of Stores. (PART 1)
2. Write a paper on Convenience Store operation.
3. Invite a manager of a Convenience Store to speak to the class.

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 8 - Retail-Discount Stores

Length: Open

Prerequisite: None

Description: A study of Discount Merchandising

Objectives: On completion of this unit the student will be able to:
1. Define Discount Merchandising
2. List 5 characteristics of Discount Stores
3. Give an opinion, backed up by facts on the future of Discount Houses.
4. Appraise the use of brand name products in Discount Stores.

Sources:
Marketing and Distribution, Mason-Rath, 1968, page 164, 183-184.
Business Principles, Organization & Mgt., 2nd Edl, Tonne-Simon, page 78.
Retail Merchandising, 7th Ed., Wingate-Samson, page 56-58, 198,152.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 39-40, 493.
Your Job in Distribution, Beaumont-Langan, page 43,102-104, 108.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 44.

OUTLINE

I. Discount Merchandising
  A. Definition
  B. Characteristics
    1. Merchandise
    2. Merchandising Methods
      a. Services
      b. Prices
      c. Advertising
      d. Interior Arrangement
    3. Use of Brand Names
  C. Effect on Other Type of Merchandising
  D. Future

ACTIVITIES

1. List the Discount Stores in your area. Get help from telephone book, other students, etc.

2. Add to the continuing chart of Stores.(PART 1)

3. Large Discount Houses and Department Stores often compete in today's markets because they offer similar merchandise. Some shoppers, however, like to shop Discount Stores while others prefer Department Stores. Visit one Department Store and one Discount Store in your area. Compare both on services, appearance, and prices. Chart your results.

4. What is your opinion of this statement: "Department Stores should attempt to turn into Discount Stores wholly or partially." Write your opinion.

5. Shop a Discount Store and make a list of well-known brand names you find. (It might be well to have a conference with the instructor to find out what brand names to look for). Compare prices with other stores. What is the $ difference? What is your opinion as to the use of brand names in Discount Houses?

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 9 - Retail-Shopping Center

Length: Open

Prerequisite: None

Description: A study of Shopping Centers--growth and trends

Objectives: On completion of this unit the student will be able to:

1. Define "Shopping Center".
2. Determine what factors are considered in the selection of stores for a Shopping Center.
3. Explain the policy of advertising promotions usually followed by Shopping Center administration.
4. Appraise the value of decor and structure as traffic builders.

Sources:
Basic Retailing and Distribution, 2nd Ed., Reich-Levy, page 111.
Business Principles and Management, 5th Ed., Shilt-Carmichael page 501.
Retailing Principles and Management, 5th Ed., Richert-Meyers, page 296, 431, 546-549.
Marketing and Distribution, Mason-Rath, 1968, page 38039, 56, 57, 90, 182-183.
Your Job in Distribution, Beaumont-Langan, page 89-90, 111,156,162.
Trade Magazines--Shopping Center Reporter

OUTLINE

I. Shopping Centers
  A. Definition
  B. Administration
    1. Selection of Stores
      a. Rents
    2. Sales Promotion
    3. Regulations
    4. Security
  C. Location
  D. Structure
    1. Mall type
    2. Parking
    3. Decor
    4. Extra Attractions
      a. Ice rinks, etc.
  E. Affect on Downtown Retailing
  F. Future

ACTIVITIES

1. Make a survey of the shopping preference of at least 20 people. (Try for a cross section). Find out their preference--Shopping Center or downtown and why. Tabulate the results.

2. Case Study. Tim Conroy was a salesperson in a specialty shop in a large Shopping Center. His friend, Dan Taylor, was a salesperson in a similar operation in the downtown section of the city. Dan said, "Our business has been dropping off. You people in the Shopping Center have all the advantages--easy parking--evening hours--select customers--newer stores-- no wonder you do better." Tim relied, "Perhaps there is more to it than what you say. I feel stores in a Shopping Center do more to______________________________."

   Finish this sentence. Is there any evidence to indicate downtown retailers are fighting back?

   Make a field trip to a Shopping Center concentrating on administration offices.

   Invite some one from the administration staff of the Shopping Center to speak to the class. Furnish him subject content from the outline with this unit. This can be done by two students.

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES

Part 10 - Retail-Roadside Stands and Vending Machines

Length: Open

Prerequisite: None

Description: A study of Roadside Retailing and Automatic Mechandising

Objectives: On completion of this unit the student will be able to:
1. List at least 15 products commonly sold through Vending Machines.
2. Analyze the future of Automatic Selling.
3. Name two factors that determine the location of Roadside Stands.

Sources: Your Job in Distribution, Beaumont-Langan, page 37, 109, 117-118.
Retailing Principles and Practices, 5th Ed., Richert-Meyer, page 34-35, 243-245.
Marketing and Distribution, Mason-Rath, page 194.
Retail Merchandising, 7th Ed., Wingate-Samson, page 330.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 500-501.

OUTLINE

I. Roadside Stands
    A. Size
    B. Location
    C. Appeal
    D. Upkeep & Rent
    E. Merchandise
    F. Problems
II. Vending Machines
    A. Type
        1. Packaged
    B. Standardization
    C. Cost of Operation
        1. Machines
        2. Repair
    D. Location
    E. Personnel
    F. Problems

ACTIVITIES

1. Assume you are assigned to help in your school store. As the store cannot be open all the time, you think Vending Machines for school supplies might be the answer.
    a. What school items could be sold?
    b. Where should the machines be located?
    c. How would they be stocked?
    d. How would change making be handled?
    e. What records would have to be kept?
    f. Who would maintain the machines?
    g. What would be the cost to the school?
    h. What profit could be expected?

2. Pretend you are going to buy into an Automatic Vending Business. Find out by interviews and telephone book?
    a. Cost--amount of money needed down.
    b. Types of merchandise available.
    c. Location of company headquarters.
    d. Names of managers and or owners.
    e. Duties you would assume.
    f. Number of machines necessary in order to make it worthwhile.
    g. Where would you place the machines?
    h. Servicing problems

3. Survey your neighborhood and find out the location and types of Roadside Stands operating.

4. Interview at least one operator of a Roadside Stand; finding out:
    a. Rent
    b. Upkeep
    c. Source of Merchandise
    d. Hours
    e. Season
    f. Personnel, etc.

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 11 - Personal Services

Lenght: Open

Prerequisite: Start this lesson with a class discussion of personal service businesses. Let the class determine which ones to develop.

Description: An overall study of business dealing in personal services. There have been 5 packets developed.

Objectives: On completion of this unit of study the student will be able to:
1. List at least 10 service businesses by type of service offered.
2. List all of the specific services offered by the business or businesses he will study in depth (see activities under each type of service business).

Sources: - General -

Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 42.
Business Principles, Organization and Management, 2nd Ed., Tonne-Simon, page 64.
Your Job in Distribution, Beaumont-Langan, page 170.
Business Principles and Management, 4th Ed., shilt-Wilson, page 23-24, 32.
Retail Merchandising, 7th Ed., Wingate-Samson, page 46.

- Hospitality Services -

Introduction to Business, Reed-Condover, 1963, page 310-313.
Your Job in Distribution, Beaumont-Langan, page 151.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 43-45.

- Restaurants and Drive-Ins -

Your Job in Distribution, Beaumont-Langan, page 108,105-106, 143.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 454-457, 562.

- Entertainment -

Introduction to Business, Reed-Conover, 1963, page 75-78.
Your Job in Distribution, Beaumont-Langan, page 174-181.

- Transportation (Travel Agency) -

Introduction to Business, Reed-Conover, 1963, page 286-289, 293-303, 305-307,

Your Job in Distribution, Beaumont-Langan, page 246-255, 264-265.
Business Principles and Management, 4th Ed., Shilt-Wilson, page 27.

- Banking and Accounting -

(Refer to unit on financing)

- Travel Agencies -

Introduction to Business, Reed-Conover, 1963, page 309-310.
Your Job in Distribution, Beaumont-Langan, page 27, 274-276.
Business Principles and Management, 4th Ed., Shilt-Wilson, page 28.

Others -

Your Job in Distribution, Beaumont-Langan, page 160, 165-167.

OUTLINE

Personal Services Businesses

I. Hospitality
   a. Hotels and Motels
   b. Resorts
II. Restaurants and Drive-Ins
III. Entertainment
   a. Bowling alleys
   b. Golf courses
   c. Theatres
   d. Amusement parks
   e. Carnivals, etc.
IV. Transportation
   a. Air
   b. Train
   c. Boat
   d. Bus
V. Banking and Accounting
   (see unit on banking services)
VI. Travel Agencies
VII. Others
   a. Landscaping
   b. Dry cleaning
   c. Etc. (fill out to class interest)

ACTIVITIES

Hospitality

1. Visit one or two hotels and motels in your community and find out:
   a. All services offered their guests
   b. Differences between hotel and motel services, if any.

2. Make a collection of advertising material on resorts in your area. From these lists, a composite of services offered. Sources could be Chamber of Commerce, newspapers, American Automobile Association and Travel agencies.

Transportation

1. Make a list of all bus lines which serve your community. Tell distance covered. Contact one and obtain a speaker for the class. Have him speak on the:
   a. Future of bus travel business
   b. Difficulties facing bus travel business
   c. Opportunities for young people

2. Compare cost of fares to a given point (over 500 miles) of bus, air, car, train. What are the advantages to the customer of each.

3. Write a paper on your finding on transportation business.

Entertainment Activities

1. Make a list of all business in your community selling entertainment services (see outline)

2. Contact at least one and find out all you can about this service business - Make arrangements for a speaker.

UNIT XV - TYPES OF DISTRIBUTIVE ENTERPRISES
Part 12 - Wholesale

Length: Open

Prerequisite: None

Description: A study of Wholesaling as a type of distributive enterprise.

Objectives: On completion of this unit the student will be able to:

1. Differentiate between full-service and limited function wholesaling.
2. Name the three types of limited function wholesaling.
3. Name three types of agent middlemen.
4. Explain the services offered by full service limited function, selling agent and manufacturers agent.

Sources:

Principles of Marketing, Zober, 1971, page 310-359.
Business Principles, Organizations and MGT., 2nd Ed., Tonne-Simon, page 61, 75, 80-81.
Marketing and Distribution, Mason-Rath, 1968, page 97,177,200-201.
Your Job in Distribution, Beaumont-Langan, page 24-25, 184-187, 196-198, 200-205.
Retail Merchandising, 7th Ed., Wingate-Samson, page 24-25.
Retailing Principles and Practices, 5th Ed., Richert-Meyer, page 12, 15, 473.

OUTLINE

I. Wholesaler- Define
    A. Full Service Wholesaler
    B. Limited Function Wholesaler
        1. Cash & carry
        2. Rack jobber
        3. Desk jobber
    C. Agent Middlemen
        1. Broker
        2. Selling Agent
        3. Manufacturer Agent

ACTIVITIES

1. Some lines of merchandise such as groceries and candies, paper products, etc., are distributed through Wholesalers to retailer; Visit a Wholesaler in your city and find out:
   a. What is the size of the trading area?
   b. How many salesmen does he employ?
   c. What products do they sell?
   d. What special services do they offer their customers?
   Suggestion: Choose a wholesaler that supplies the school store if possible.

2. The total retail sales volume in the U.S. in a recent year was approximately $261,630,000,000. The total wholesale sales volume was $164,600,000,000. What % is the wholesale volume to retail volume? On a separate piece of paper write your reasons for the difference.

3. Invite a broker to speak to your class. Have him explain what a broker does - Does he own the merchandise he handles? Who are his customers? (Not by name).

4. Find a retail store that makes use of a rack jobber. (example - garden seeds, bakery goods, etc.)
   Interview the manager of the store and find out: a. benefits to the store, b. records/payment. If possible find the name of a rack jobber and arrange for an interview.

UNIT XVI

THE AMERICAN ECONOMIC SYSTEM

Part 1 Employee Economics and DICE
2 Scarcity and Allecation
3 Circular Flow of Income: Interaction of Workers With Other People and Groups to Obtain Goods and Services
4 Economic Goals
5 Importance of Production in an Economy
6 Importance of Marketing an an Economy
7 Decision Making in a Market Economy
8 Profit and Property

NOTE TO INSTRUCTOR

It is expected that the coordinator will duplicate most of the material in this unit and distribute it, part by part, as the student completes each portion. The outline and initial activities in each part are to be done individually but the coordinator should read the activities before duplicating and withhold from distribution some group activities and tests for group distribution. These activities may be used before or after the students commence individual work on outline and pertinent activities. The activities were written to support the behavioral objectives of each part but there is some overlap and the coordinator may select those he considers most suitable.

The sources for each part are necessary for student completion of the outline. If neither listed sources nor substitutes are available, the coordinator may choose to use only behavioral objectives and activities.

UNIT XVI - AMERICAN ECONOMIC SYSTEMS

Part 1 - Employee Economics and DICE

Length: Open

Prerequisite: None

Description: A study in how the employee is affected by economics in his personal life and in his activities as a citizen with an approach to arriving to alternative solutions for economic problems.

Objectives:

1. Given a list of 5 personal economic activities the student will be able to illustrate each with at least one example.
2. Upon completion of exposure to a presentation by a panel or speaker on the subject, the student will identify two or more economic activities of a firm.
3. By calculating cost of his wages within context of gross of business, the student will appreciate the importance of economic competency.
4. The student will demonstrate the use of the DICE method of arriving at sound economic conclusions by arriving at alternative solutions in case studies involving:
   - a. The worker
   - b. The consumer
   - c. The firm
   - d. The society

Sources:

Economics for Young Workers, Office of Education, 1966, page 9-38.
General Business for Everyday Living, Price, 1966, page 2-6.
Marketing, Sales Promotion and Advertising, Nolan-Warmke, 1965, page 13-14.

OUTLINE

I. The importance of economic competency to the employee.
   - A. What wage should a high school graduate expect on his first full-time job? What can you offer the employer in exchange for your wages?

B. What factors do employers take into account in determining how much to pay you?

C. How does economics affect your goals and opportunities as a worker? (Wages, standard of living, educational plans, family plans).

II. List economic activities in which you and other students are engaged. Some personal activities are:

III. Economic activities of a firm (necessary for the existence of jobs)
   A. Identify economic needs with objective toward starting a business

   B. Using inputs in an efficient manner
      1. materials
      2. labor
      3. equipment
      4. land
      5. building
      6. management skill
   C. Satisfying conflicting demands of customers, investors, and employees.
   D. Competing with other firms
      1. prices
      2. product features
      3. services
   E. Maximizing profit
      1. role of increasing sales
      2. role of decreasing costs

IV. The citizen-voter's need for economic competency
   A. Voting directly on economic issues
   B. Supporting candidates who will make wise, representative economic decisions for the public

C. Influencing and encouraging public officials to act on economic issues.
D. Demanding and using public services
E. Paying taxes

V. The DICE Method is a valuable tool in arriving at sound economic decisions. The four steps are as follows:
   A. Define the problem
   B. Identify the goals and rate goals
   C. Choose the alternative solutions
   D. Evaluate the possible consequences of choosing each alternative.

ACTIVITIES

1. The first two individual activities are performed as part of the preceeding outline.
2. Since a firm does not begin to make a profit until it sells enough units to cover fixed costs (rent, utilities, equipment) and variable costs (wages, advertising, raw materials or merchandise), employees who contribute less dollar value to a firm's productivity or sales than they collect in wages reduce the firm's profits. Compute how much dollar volume of sales a salesman must make if his wages are $30.00 per week and the firm must hold down selling costs to 6%. Compute your own percentage selling costs to the firm that employs you by figuring what percent your wages are of the total amount you sell in a week OR compute how much dollar volume of goods must be sold to cover your wage costs if the firm must hold them to 3% in order to make a profit.
3. Home Interview Discuss with parents the questions, "Did the stand of a political candidate who took on government taxing and spending influence your vote in the last election?" If parent is unavailable or student chooses, a neighbor or adult friend may be respondent.
4. Do the DICE case studies, included.
5. Panel Presentation. Have three or four businessmen representing different types and sizes of businesses each report on the economic activities of their firm and then have class ask questions. Give each panelist an outline of what is included in the outline, under A & B. (Note: Students should make arrangements)
6. Panel including 3 people (housewife, businessman, government official) report on the economic activities engaged in by the institution he represents (household, firm, government). Supply each panelist with a list of suggested economic activities.(Note: Student arrange)

UNIT XVI - AMERICAN ECONOMIC SYSTEM
Part 1 - Employee Economics and DICE
Activity 4 - Case Study Using DICE

Case Study No. 1: An Economic Decision Involving the Worker

John Dee had been employed by the same firm for the past six years. He is a satisfactory employee, respected by his employer and co-workers. His salary range is between $450 and $500 per month. John now has the opportunity to go into business for himself. He can start a private business with an investment of $10,000 and complete payment for the business over the next 15 years. Indications are that sales volume will be sufficient to meet overhead costs and make payments on the business loan. Income returns to John personally would be quite limited over the next 15 years.

a. Should John go into business for himself? Explain
b. What rewards and satisfactions would be resolved by remaining with his present employer? Starting his own business?
c. What drawbacks are there in each situation?
d. Are there any alternative courses of action?

Case Study No. 2: An Economic Decision Involving the Consumer

You, as a consumer, own an automobile which you use a great deal for transportation to and from work, trips, short drives, shopping, and other recreational purposes. Assume gasoline prices have been about 33 cents per gallon for regular octane. Also, assume gasoline prices begin a steady climb upward until they reach $2.00 per gallon for the same regular octane.

a. How would these prices affect your purchase of gasoline?
b. If you cut down on gasoline purchases, which activities would you eliminate first when deciding to use your automobile?
c. At what point would you stop buying gasoline altogether?
d. What alternative courses of action could you take?

Case Study No. 3: An Economic Decision Involving the Firm

You own or manage a business firm which has annual sales of about $100,000. You have an opportunity to install a new neon sign on the front of your building. The sign is very attractive and can be bought and installed for $2,000. You have enough cash to make the purchase. The cost of operating the sign (electricity tubing, maintenance) is about $13.50 per month. Your firm operates on a gross margin of 40% and has a return in net operating profit of 2%.

a. Should the sign be installed? Explain
b. How much in additional annual sales would be required to maintain the same dollar amount of net operating profit?
c. Would the sign be likely to have the "pulling power" to increase sales beyond what was needed to maintain the same dollar amount of net operating profit?

Case Study No. 4: An Economic Decision Involving Society

You are a citizen of a community of about 30,000 persons. There is no adequate airport in the community so commercial airlines cannot service your area. Your Port Commissioners decide to have an airport built at a cost of $1 million. This would require a public vote on a bond issue to raise the necessary revenue. It would take approximately 25 years to redeem the bonds and interest. Taxes would increase about $10 per person per year.

a. Would you be in favor of this bond issue? Why or why not?
b. What advantages and disadvantages would accrue to the community?
c. How would you personally benefit from this installation?
d. How would you rank this expenditure with:
    (1) $5 million for a new high school?
    (2) $2 million for a community recreation center which would include a swimming pool, sports arena, and meeting area.
    (3) $2 million for a new vocational-technical school
    (4) $2 million for street and highway improvement in the community specifically, improvement of Wenatchee waterfront according to plan proposed.

UNIT XVI - AMERICAN ECONOMIC SYSTEM
Part 2 - Scarcity and Allocation

Length: Open

Prerequisite: None

Description: A study of the fundamental problem of all economic systems----satisfaction of insatiable wants from limited resources.

Objectives: At the completion of this lesson, the student will be able to:

1. Discover that wants are unlimited by composing a list of 10 of his wants and succeeding that with a listing of more wants
2. Discover that wants are related by composing a list of 10 of his wants and succeeding that with a listing of related wants
3. Discover that the time element influences wants by making and comparing two lists of kitchen items, one of the 19th century and one of the 20th century.
4. Identify the four decisions that must be made within any economic system assuming unlimited wants and limited resources.
5. Using SRA Economic Decision game of "Scarcity and Allocation" (or the alternative Robinson Crusoe, included) the learner will be able to evaluate alternative solutions to problems of scarcity and allocations in a hypothetical island community of shipwrecks who arrive with only clothing and skills, make decisions and create leisure by choosing between alternatives of present consumption and present self-denial.

Sources:
"Scarcity and Allocation", SRA Economic Decision Games
"National Economy", SRA Economic Decision Games
Economics For Distribution, Strietelmeier, Materials Laboratory, Ohio Distributive Education, page 1-11.
"Some Concepts Essential to A Basic Understanding of Economics", Harron & Hoff, Southwestern Monographs, 1964, page 5-8.
"Economic Ideas and Concepts", Joint Council on Economic Education, 1964, (Calderwood), page 3-4.
General Business For Everyday Living, Price et al, 1966, page 26-30
Business Principles and Management, Shilt-Carmichael-Wilson, page 1-21.
Marketing In Our Economy, University of Texas, page 5-23.
Economics and Freedom, Campbell, Potter, Adam, 1964, page 40-76.
Consumer Economic Problems, Warmke, Wyllie, et al, 1971, page 1-10,19
Economics USA, Leith and Lumkin, Gregg/McGraw Hill, 1968, page 20-22
Economics For Modern Living, College Entrance, 1962, page 14-32.
Economics and Freedom, Campbell, Potter, Adam, Haverford House, 1964, page 54-67.

OUTLINE

I. Wants are insatiable
  A. Many economic wants to choose from such as: food, clothing, autos, TV, pens, haircuts, medical attention, public transportation, education, better housing, national defense, urban renewal,etc.
  B. Some wants are related to each other and satisfaction of any one want may create another.
  C. Economic wants do not include such things as air, sunshine, ocean water, and non-material things such as friendship, a happy marriage, or religious satisfaction.
  D. Some economic wants are individual (own clothes, toothbrush,) some are collective such as family (house, furniture,) or social (highways, national defense, foreign aid, urban renewal.)
  E. Some economic wants are for services such as those performed by teachers, barbers, mailmen, congressmen, etc.
    a. Some repetitive (eating, haricutting, clothes wear out)
    b. Some are conditioned by time (horse vs auto, etc.)
    c. Population increase adds people with wants.
  G. Resources are limited.

II. Faced with unlimited wants and limited resources, we must allocate our resources. We must decide:
  A. What goods and services will be produced?
    1. Resources used for one purpose cannot be used for another
    2. Consumer goods and services must be weighed with needs for industrial or productive sector of economy.
    3. Costs of capital goods, such as machines, is the consumer goods which must be foregone through saving to get them---this is known as opportunity cost.
    4. Which goods and services should be produced first, which next and which later?
    5. How much of the available resources should be invested to improve production in the future? In other words, how much should be assigned to the creation of more and better tools and to the search for improved methods and goods to satisfy unmet needs?
  B. How will goods and services be produced?
    1. Combinations of factors of production possible
      a. Large amount of labor and little capital (as in China where pictures show people building highway by hand).
      b. Use labor-saving machines (capital)
      c. Some goods lend themselves better to hand craftsmanship.
    2. Who will provide capital and management?
      a. Government
      b. Private
      c. Combination
  C. How much should be produced in total? This means how fast shall the economy grow and how shall it obtain reasonably stable growth, avoiding both depressions and inflation?
  D. Who shall receive the goods and services produced for consumption?

ACTIVITIES

1. List ten wants. Compare list with that of four fellow students and see if any item on their list should be added to yours. Can you add any more items?

2. Using original ten wants listed above, assume that these wants have been satisfied. Compose a new list of wants related to those on the original list. (eg., a new highschool building develops related wants such as furniture, heating, blackboards, cafeteria, et al, etc.,)

3. SRA Game "Scarcity and Allocations" may be played with group of 4-5 fellow students (see instructions)*

4. Form a committee of four people and explore and explain how various economic systems deal with the four decisions concerning scarcity and allocations. Use DICE and references on comparative economic systems.

5. SRA Game "National Economy" may be played with group of 4-5.

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* Alternate activity for Activity #3: "Suppose that one day you found yourself in a position similar to that of Robinson Crusoe. Your ship is wrecked and you find yourself on an island with little or no hope of rescue. You are alive, but your main problem is to stay alive. You must take what is available to you...your physical strength...natural resources...then by your shrewd management...knowledge and skills acquired...and determination, you try to produce what you need. Solving your problem requires common sense....for if you spend too much time in providing shelter, you go hungry; or if you spend too much time making clothes or gathering food, you suffer from elements of nature because you have no hut or shelter. Unless your standard of living never increases to more than mere existence.
Beginning with the assumption that it will take 10 hours to find, gather and/or catch food with your bare hands, compose a day by day or week by week plan of how you will spend your hours.

UNIT XVI - AMERICAN ECONOMIC SYSTEM
Part 3 - Circular Flow of Income

Length: Open

Prerequisite: None(It is important to avoid introduction and begin reading sources)

Objectives: The student comprehends how workers interact with other groups in society to obtain goods and services when he can:

1. Describe how workers exchange their resources for wages, rent, or interest.
2. Describe how workers exchange their personal income for goods and services.
3. Explain how savings go into investments from flow of income and purchases.
4. Identify how governments participate in the flow of goods and services.
   a. producing public services
   b. obtaining resources from individuals
   c. regulating and protecting interests of individuals and groups

Sources:
Economics for Young Workers, U.S. Office of Education, 1966, page 32-37.
Economics for Distributive Education, Strietelmeier, page 32-36.
Marketing, Sales Promotion and Advertising, Nolan-Warmke, 1965, page 7, 24-25.
Economics USA, Leith and Lumkin, 1968, page 225-227, 230-239,241-244
"Some Concepts Essential to a Basic Understanding of Economics", Barron and Hoff, 1964, page 10-11.
"Economic Ideas and Concepts", Joint Council on Economic Education 1964, page 13-44.
Consumer Economic Problems, Warmke, Wyllie et al, page 20-24.

OUTLINE

I. Flow charts in sequence show circular flow of income beginning with basic chart of flow between firm and consumers (household) and developing into full circular flow with all input and participants.
II. Place where workers participate can be noted in each chart.
III. Flow charts show that workers may also own part of the firm and that they may own other productive resources such as land and raw materials.

ACTIVITIES

Using the flow charts, analyze:

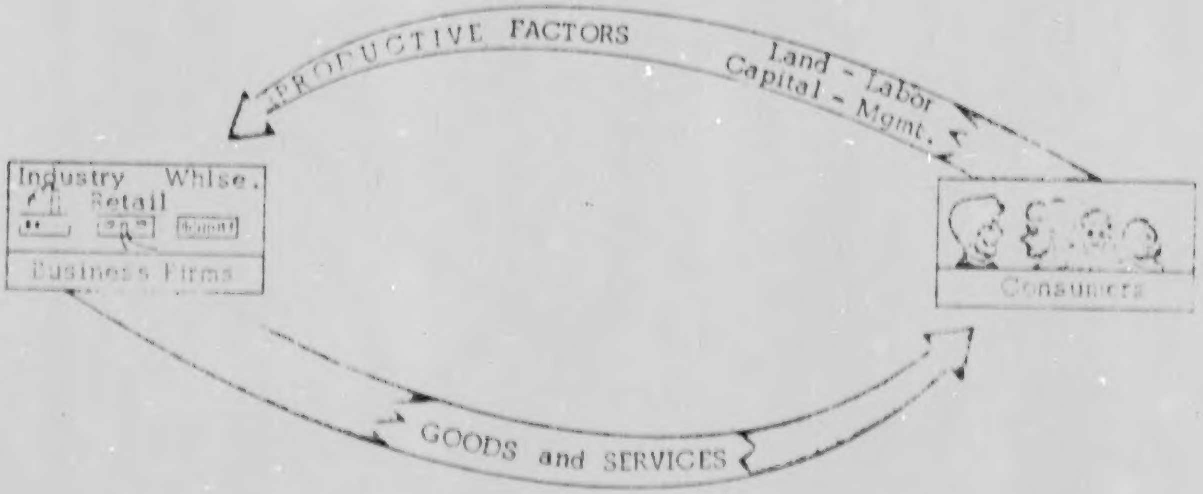
1. How workers exchange their resources for wages, rent, or interest.
2. How workers exchange their personal income for goods and services.
3. How savings go into investments from flow of income and purchases.
4. How governments participate in the flow of goods and services.

UNIT XVI -- AMERICAN ECONOMIC SYSTEMS
Part 3 - Circular Flow
Activity - 1-1

Transparency

CIRCULAR FLOW OF GOODS AND SERVICES

(Two Basic Units of an Economy)

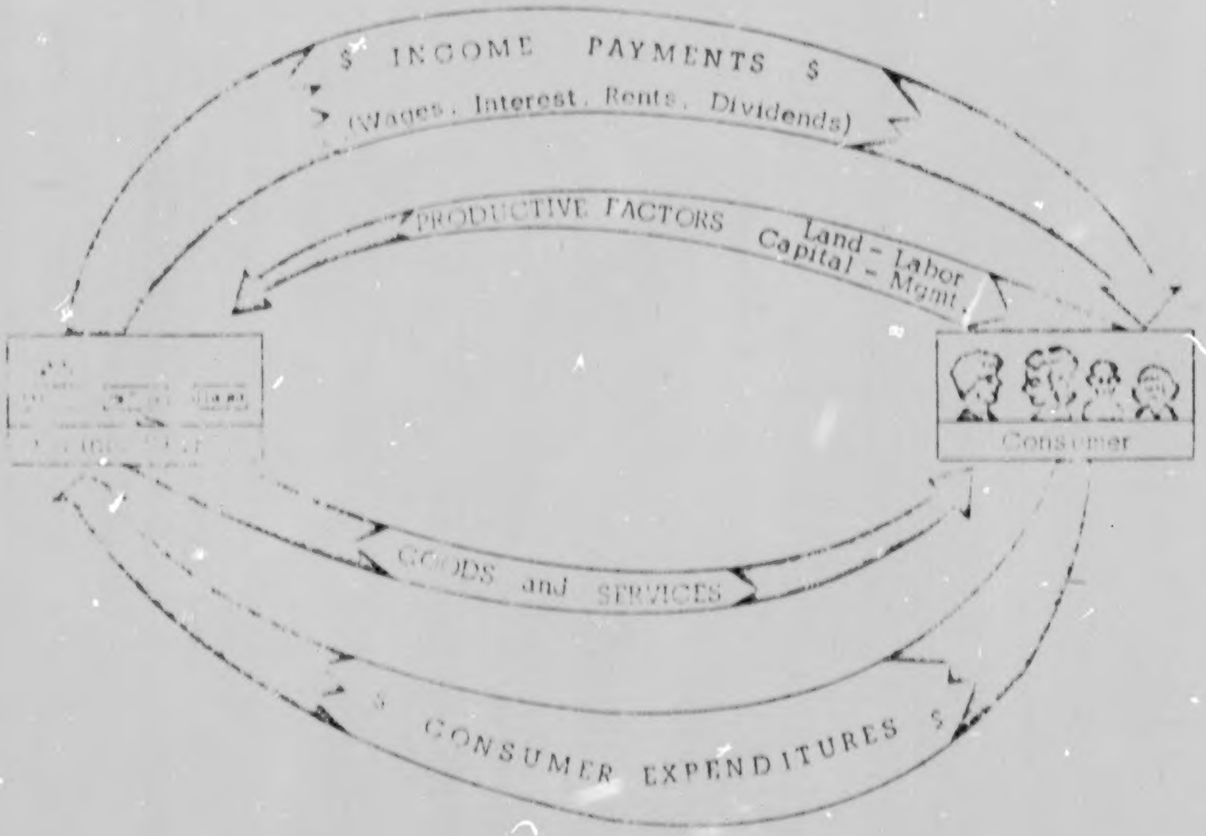

PRODUCTIVE FACTORS
Land - Labor
Capital - Mgmt.
Industry
Whlse.
Retail
Business Firms
Consumers
GOODS and SERVICES

UNIT XVI - AMERICAN ECONOMIC SYSTEMS
Part 3 Circular Flow
Activity 1-2

Transparency

CIRCULAR FLOW OF INCOME (MONEY)

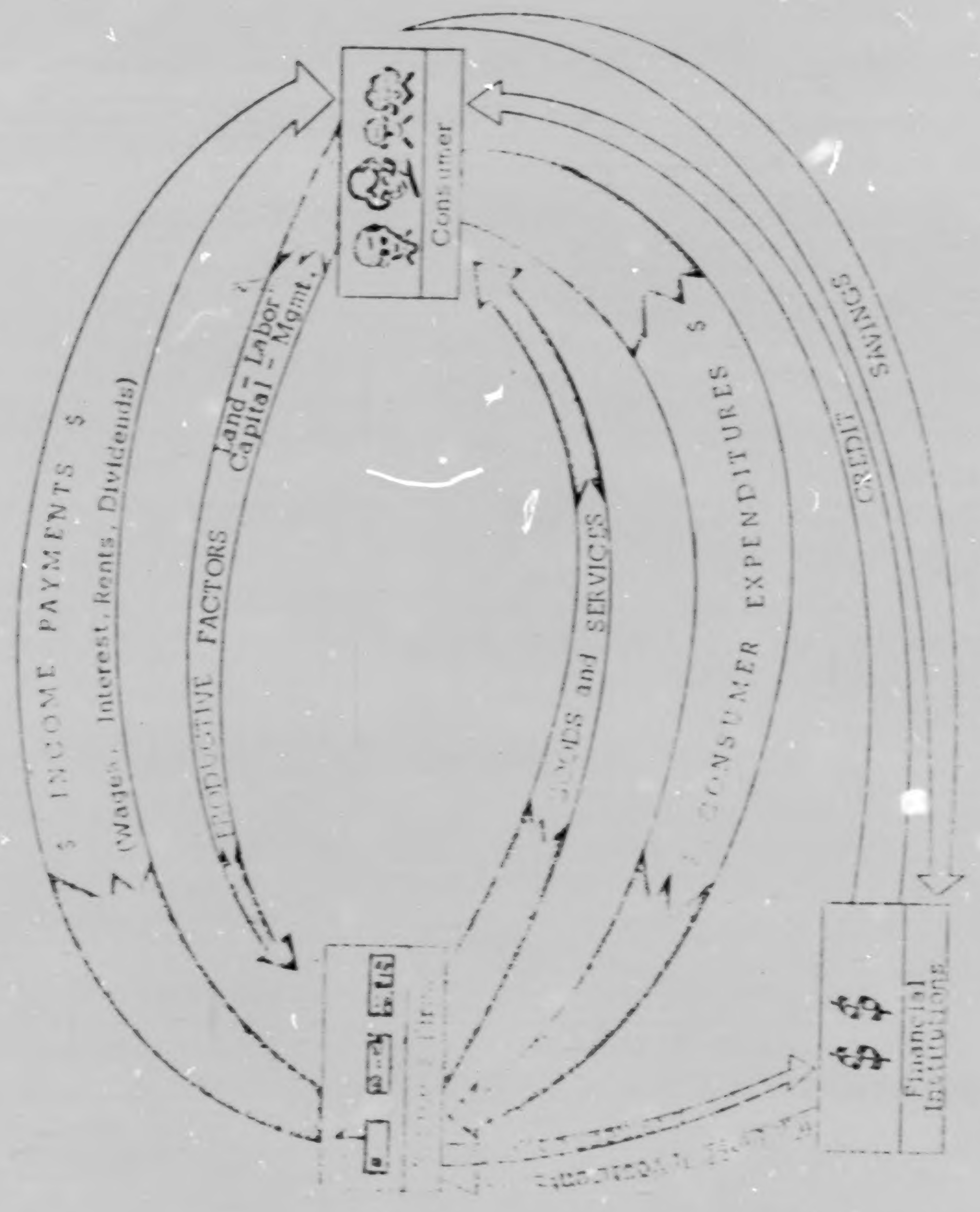
(Added to Flow of Goods & Services)


$ INCOME PAYMENTS $
(Wages, Interest, Rents, Dividends)
PRODUCTIVE FACTORS
Land - Labor
Capital - Mgmt.
Consumer
GOODS and SERVICES
$ CONSUMER EXPENDITURES $

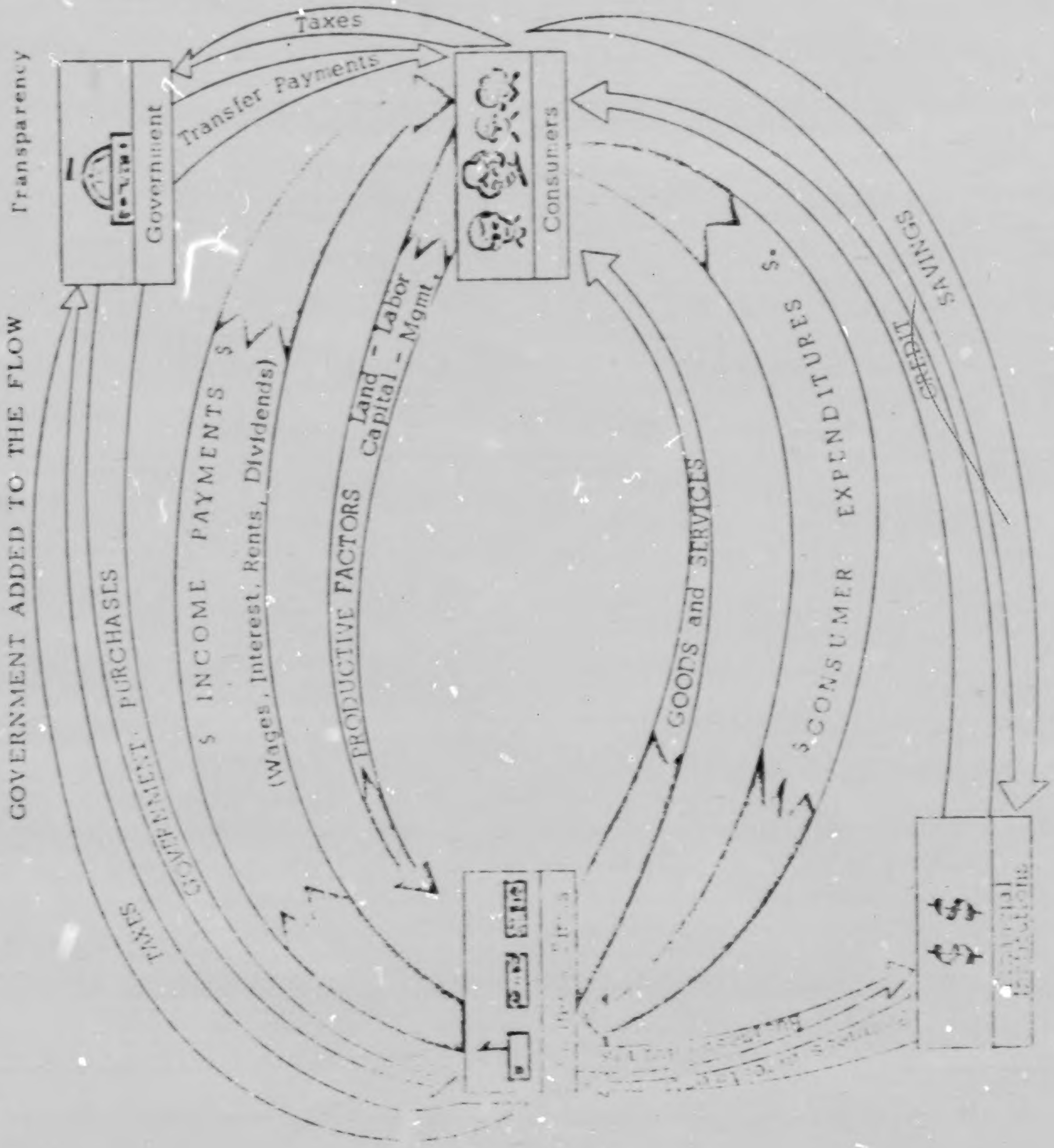
UNIT-XVI - AMERICAN ECONOMIC SYSTEMS
Part 3 - Circular Flow
Activity 1-3

Transparency

FINANCIAL INSTITUTIONS ADDED TO THE FLOW


$ INCOME PAYMENTS $
(Wages, Interest, Rents, Dividends)
PRODUCTIVE FACTORS
Land - Labor
Capital - Mgmt.
Consumer
GOODS and SERVICES
$ CONSUMER EXPENDITURES $
CREDIT
SAVINGS
$ $
Financial Institutions

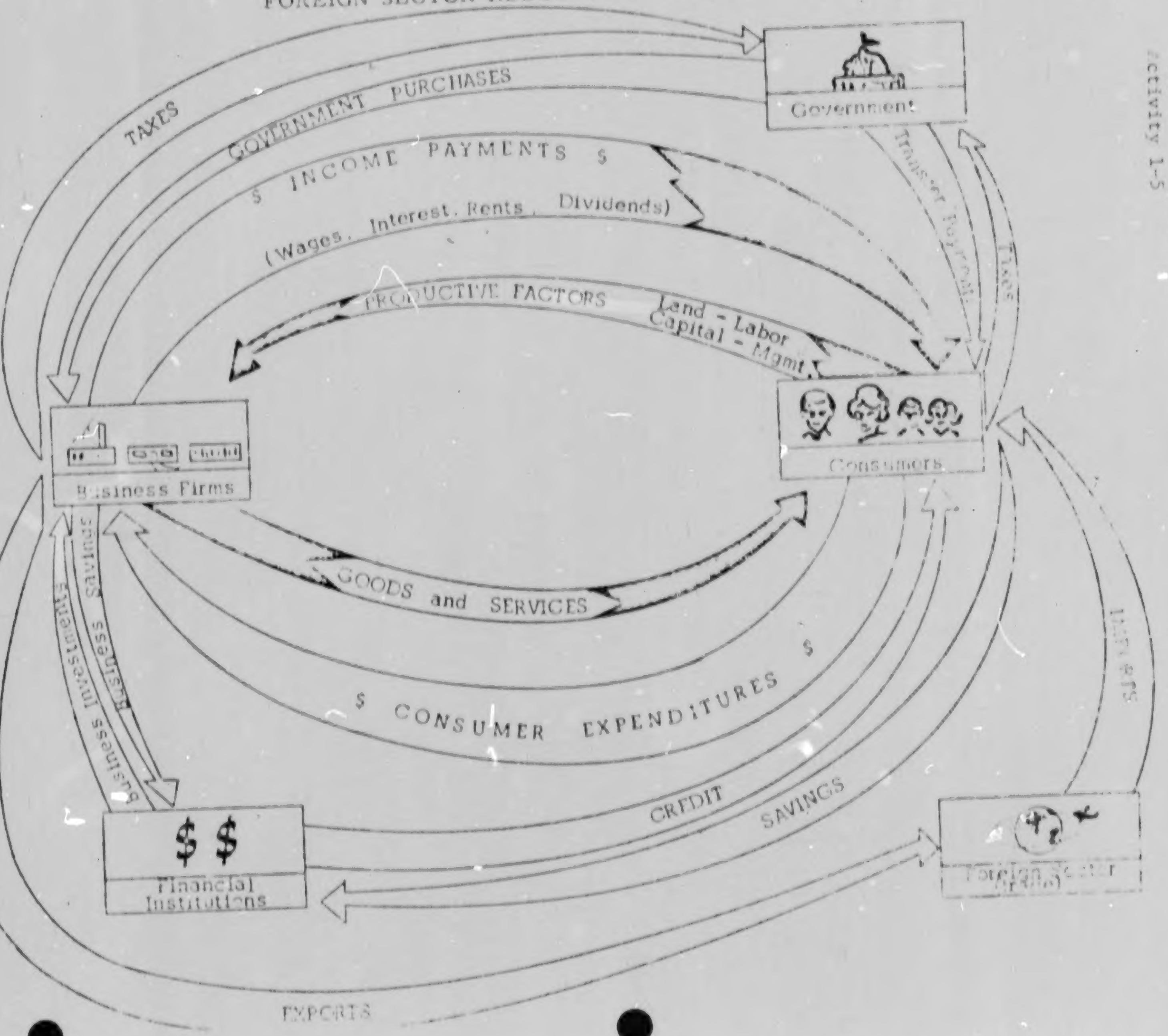
UNIT XVI - AMERICAN ECONOMIC SYSTEMS
Part 3 - Circular Flow
Activity 1-4


Transparency
Taxes
Transfer Payments
Government
Consumers
GOVERNMENT ADDED TO THE FLOW
GOVERNMENT PURCHASES
TAXES
$ INCOME PAYMENTS $
(Wages, Interest, Rents, Dividends)
PRODUCTIVE FACTORS Land - Labor Capital - Mgmt.
GOODS and SERVICES
$ CONSUMER EXPENDITURES $
~~CREDIT~~ SAVINGS
$
$

UNIT XVI - AMERICAN ECONOMIC SYSTEMS
Part 3 - Circular Flow
Activity 1-5

FOREIGN SECTOR ADDED TO THE FLOW

Transparency


Government
Consumers
Business Firms
Financial Institutions
Foreign Sector
TAXES
GOVERNMENT PURCHASES
$ INCOME PAYMENTS $
(Wages, Interest, Rents, Dividends)
PRODUCTIVE FACTORS
Land - Labor
Capital - Mgmt
Transfer Payments
Taxes
GOODS and SERVICES
$ CONSUMER EXPENDITURES $
Business Savings
Business Investments
CREDIT
SAVINGS
IMPORTS
EXPORTS

UNIT XVI - AMERICAN ECONOMIC SYSTEM
Part 4 - Economic Goals

Length: Open

Prerequisite: None

Description: A study of emphasis on various economic goals and the effect on the type of economic system created by the chosen emphasis of the society.

Objectives:

1. The student will be able to list the five major goals of Western economic systems as given in class.
2. Given a list of five questions requiring personal opinion, developing that opinion and comparing and contrasting his opinion with others in a group of five students, the student will recognize that different individuals within the same economic system will emphasize different goals (questions are included in outline "B")
3. Using sources such as Survey of Current Business, Facts and Figures on Government Finance, Statesman's Yearbook, World Almanac, or U.N. Publications, the student sets up a chart comparing the emphasis placed on economic goals by several countries (egs. Russia, China, Sweden, West Germany, Japan, U.S.) (Sample inquiries for chart headings are found in Activity 3, this part).

Sources:

Marketing, Sales Promotion and Advertising, Nolan and Warmke, 1965, page 9-12, 25-37.
Economics USA, Leith and Lumkin, 1968, page 18-28, 547-549.
Economics and Freedom, Campbell, Potter, Adam, Haverford House, 1964, page 60-73 (76-85, extra background for interested).
Economics of American Living, Heckman, page 136-161.
Consumer Economic Problems, Warmke, Wyllie et al, page 7-14,24-26.

OUTLINE

I. The Five Major Goals of Western Economic Systems are:
   A. Maintaining individual freedom
   B. Developing economic stability
   C. Maintaining economic security
   D. Promoting economic growth
   E. Securing economic justice

II. Different individuals within the same system will place a different emphasis on each goal. (Individual freedom omitted temp)
   A. What do these economic goals mean to you as a worker?
   B. Why do workers want economic stability?
   C. What kinds of economic security do workers want?
   D. How does economic growth affect the worker?
   E. What is economic justice and how does it affect workers?

III. The relationship between a country's economic system and the importance it places on various economic goals.
   A. Emphasis on economic growth
      1. Investment in capital goods.
      2. Training of workers
      3. Improvement of technology
   B. Emphasis on economic security
      1. Government participation in economic activities
      2. Government central of productive resources
   C. Emphasis on economic justice
      1. Measures to distribute income equally
      2. Public assistance to less fortunate
   D. Emphasis on economic stability
      1. Price and wage controls
      2. Measures to balance supply and demand
         a. Spending
         b. Taxing

IV. The American competive enterprise economy
   A. Individual rights
      1. Right to choose occupation or go into business
      2. Right to produce whatever customers want to buy
      3. Right to hold private property, including productive resources.
   B. Role of Markets
      1. Consumers determine what will be produced.
      2. Profit motive encourages produce to satisfy consumer demands in an efficient manner.
      3. Prices of goods and services are determined by the interaction of supply and demand.
      4. Limited controls to protect individuals and facilitate market system.
   C. Role of Competition
      1. Improve quality and reduces consumer price.
      2. Prevents the producer from taking unfair advantage of the worker or the consumer
      3. Results in progress from improved techniques, production and distribution.
      4. Raises living standards by encouraging businesses to increase output and provide more goods at lower prices.

V. Centrally controlled economy/management controlled economy
   A. Government owns all productive resources
      1. Central authority determines what, how much and for whom goods and services shall be produces.

ACTIVITIES

1. Complete section "B" of outline.

2. In your judgement, what characteristics of the competitive enterprise economy seem to be less well understood. What features of the competitive enterprise economy seems to be most important to individuals? Least important? Why do you think people so rate the relative importance of these features?

3. Aside from maintaining individual freedom, the goals of such countries as Russia, China, Sweden are similar to each other and the U.S. The difference in economic systems vary with the relative importance the countries place on the goals. Compare the economic systems of several countries and analyze the emphasis placed on economic goals. (i.e. how do countries solve their problems to meet goals.) Compare over a ten year period using Survey of Current Business, Facts and Figures on Government Finance, or UN Publications.
   Sample inquiries:
   a. What are social security laws in different countries?
   b. What is the breakdown of gross national product for consumer goods, capital goods, government spending?
   c. How are decisions made concerning investment in capital goods and improvement of technology?
   d. What is the distribution of income?

4. Students divide into groups of 3-5. Groups brainstorm each of five questions on goals as given in outline "B". Remember that "brainstorm" means every suggestion is acceptable for inclusion and that various answers are likely. Each group pick up from instructor a 10 mil transparency for each question (5 clear transparencies). At the top of each transparency you will find that one of the questions has been written by the instructor. On each transparency question, your student recorder will briefly list group answers. Each group will use the overhead and present answers to class.

5. Using the same group as above, role-play a group assigning priorities. Agree on students to play different roles such as: a self-made millionaire, a pondering politician, a black, a Chinese merchant, or restaurant owner, a migrant worker, a main street small businessman, a stockholder or a "hard hat" (such as Archie of "All In the Family"), an owner of a small franchise (Karmelcorn for example), a retired person on social security only, a retired person who has saved much other money, a person who has been on public assistance for five years or more, a government employee, etc. Add any other who might have a different view, if you wish, but assign only one role per group member at a time.

6. Role-play a 3-4 member central committee of a controlled/managed economy. Your prime objective is to build the military strength of the economy. Decise: (1) what goods and services will be produced (2) how much of

each (3) how they will be produced (4) how they will be distributed among the people. After making your decisions in accordance with the objectives of the committee, ask the class for reactions to these decisions.

* instead of military strength, building a series of dams, a steel factory in a country without any or some such may be substituted.

7. Field Interviews: Prepare questions and interview employers and workers on the topic, "The Meaning of American Competitive Enterprise Economy".

8. Invite a resource speaker to speak on "What the American Competitive Enterprise Means to Our Community". Try to find a strong, knowledgeable booster of our system; perhaps one who has been to other countries.

9. Instructor Guide to outline Part 2.
   Section "B" of the outline might include the following topical responses:
   1. What do these economic goals mean to you as a worker?
      Possible responses: protection, opportunity, security.
   2. Why do workers want economic stability?
      Possible responses: employment, prices level, savings protection.
   3. What kinds of economic security do workers want?
      Possible responses: old age, unemployment, financial aid.
   4. How does economic growth affect the worker?
      Possible responses: satisfying needs, higher standard of living, employment.
   5. What is economic justice and how does it affect workers?
      Possible responses: income, value of dollar, education.

UNIT XVI - AMERICAN ECONOMIC SYSTEM
Part 5 - Importance of Production in an Economy

Length: Open

Prerequisite: Scarcity and allocations, part 2.

Description: A study of the importance of capital goods and secondly land and labor.

Objectives:

1. The student discovers the usefulness of tools when he observes three students, given a common writing assignment and three different materials for sharpening pencils.
2. Given the "Log Cabin Formula" that production equals land plus labor X capital and a list of items making man's material welfare, the student will be able to substitute the necessary factors of production for each of five items from the list.
3. The student will be able to distinguish the classifications of capital as to (1) free capital (2) specialized capital (3) fixed capital (4) circulating capital when he is given a list of capital goods and correctly labels each one.
4. The student will be able to list the five costs of production with 100% accuracy.
5. The student will be able to list the four kinds of utility with 100% accuracy.
6. The student will give an example of job creation by capital investment when he prepares a proposal for a DECA investment that will aid in a fund raising project.

Sources:

Business Principles and Management, Shilt et al, page 1-21.
Fundamentals of Selling, Wingate and Nolan, 1969, page 9-11.
Retail Merchandising, Wingate and Samson, 1968, page 17-20.
Marketing, Sales Promotion and Advertising, Nolan and Warmke, 1965, page 3-6, 67-69.
Business Principles and Management, 4th Ed., Shilt and Wilson, page 2-4.
Economics USA, Leith and Lumkin, 1968, page 139-158, 161-167, 262-270.
General Business for Everyday Living, Price et al, 1966, page 3-6 and 10-12.
Economics for Modern Living, Fraeir, 1962, page 56-66.
Economics and Freedom, Campbell et al, 1964, page 5-56, 100-127.
Retail Merchandising, Wingate and Weiner, page 13-16.
Consumer Economic Problems, Warmke, Wyllie, et al, page 63-79, 85, 276-282, 290.
Marketing in Our Economy, University of Texas, page 5-23.

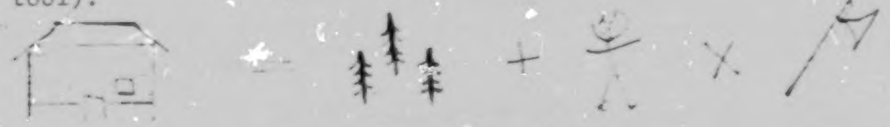
OUTLINE

I. Factors of Production

A. The three primary factors of production are:

1. land
2. labor
3. capital

B. The "Log Cabin Formula" is a descriptive formula illustrating the factors of production. In this formula the log cabin stands for production(of man's material welfare), the trees for natural resources of land, the stick figure of a man for labor, and the axe for capital (a tool).



C. What would be the effect of substituting a chain saw for the axe?

D. In the distant past, man had to first find his shelter; later, he built it with sharpened stones. Recalling your experience of the "Scarcity and Allocations" game,what would you expect that man had had to do to procure even such a simple tool as a stone axe? As man progressed and learned metallurgy, a similar but greater capitalization was required.

E. Natural resources (land) either exist or do not exist. Recalling again "Scarcity and Allocations", very simple needs can be met by merely finding natural resources of land such as game or nuts or fruit. (This assumes a much smaller population such as the undeveloped world had when China had only 30 million). However, man's material welfare has, for centuries, required the addition of energetic, trained labor and capital. (It is often pointed out that the American Indian had the same natural resources as do we; the Australian bushman the same as the modern Australian; and the same lack of natural resources had been "enjoyed" by the Japanese for centuries.

II. Classification of Capital

Capital

A. Capital may be free or specialized.

Free capital represents goods which can be used in more than one type of industry---coal or iron, for example. It can be easily converted into cash because it has many uses.

Specialized capital represents goods which can be used in only one type of production---railroad tracks or a printing press, for example. specialized capital may become worthless of society's wants or modes. of production should change (i.e. trolley cars to buses renders tracks into scrap metal)

B. Capital may be characterized as fixed or circulating capital.
   1. Fixed capital may be used over and over again in production. Factory buildings and machines are examples.
   2. Circulating capital is that which is used up in a single productive process such as coal in making steam, cloth in making a purse or dress.

C. Capital may be classified under two of the above (eg. coal is free and circulating and the printing press is both fixed and specialized).

D. Capital is not simply money. A five dollar bill is money but if used to purchase a "night on the town" it is not capital, nor is it capital if used to buy a record or gasoline for a car. If the car is used as a tool of production (eg. for an AVON lady), it becomes fixed capital and the gasoline used when taking and delivering orders is part of capital. (circulating capital used for operations).

E. Depreciation. Even fixed capital gradually gets used up, or worn out. Funds must be put aside to replace these capital goods for eventual wear out.

III. Production creates utility
   A. Four kinds of utility (usefulness) are:
      1. Form
      2. Time
      3. Place
      4. Possession
   B. Production is primarily concerned with form and, to some extent, place utility.
      1. A piece of furniture has form utility. Starting with a tree, which is cut into lumber (form utility), it is recut into the shapes necessary for the furniture (additional form utility) and ultimately put together in a form useful to consumers.
      2. Production is concerned with form (cont'd)
         1. A watch is an item with form utility that requires a combination of material resources put together in a form useful to consumers.

ACTIVITIES

1. In place of the log cabin(the "Log Cabin Formula" for man's material welfare), substitute some other example. Sketch your own illustration showing the three primary factors of production. Your substitution might be any material item such as an auto, a cycle, clothing, a hamburger, etc. You may wish to sketch several natural resources in,if several are combined to make the article chosen.
2. Assume that you want to go into a pottery goods business. What do you need to make pottery? (i.e. What will you need that is specialized capital? What will you need that is fixed capital?) How will you get money for capital to buy these things. Identify which items needed are free capital and which are circulating?
3. Use any item that you wish and do the above exercise. Examples: candy dressmaking, clipboards...
4. Assume that you are responsible for the DECA treasury. Make a proposal using part of it for capital and part of it for consumer expenditure.

5. (May buzz) Name specific individuals, persons known to students, who earn all or part of their living through: (a) ownership of land, (b) performance of labor (c) investment in capital goods.

6. Using the yellow pages of the telephone book, list the names of all known manufacturers that appear in the yellow pages, the purpose served and the goods produced.

7. SRA game "National Economy" may be used if available.

8. The Hastings Manufacturing Company borrowed $320,000 at 8 percent interest, and spent all of it on tools and equipment with which to expand its production. As a result of this expansion, 10 new jobs were created.
   a. What is the amount of capital used to create each of the new jobs?

   b. How much interest must be paid during the first year on the total investment in tools and equipment? How much must be paid on the investment for each new worker?

   c. Do you believe that this is the kind of expansion that the Hastings Manufacturing Company should expect to accomplish every two or three years? Why?

9. Test (Attached)

UNIT XVI - AMERICAN ECONOMIC SYSTEM

Part 5 - Importance of Production In An Economy

Activity Test

1. What does each factor of production contribute to the production of goods and services? Which factor is most important? Why do you think so?

2. Assume that you are in charge of moving a ton of food a distance of 100 miles. Rather than move it on the backs of men, you have available any capital resources that you require . Select and name your means of transporting the food and trace back to the raw materials, the tool or tools used in each step, toward a finished product. Point out the manufacturers involved at each step. How was capital important?

3. The Log Cabin Formula for the factors of production is given below:

Select five items from the following and list the specific factors of production necessary to produce each item. In some cases more than one resource and/or tool will be necessary to produce the chosen item of man's material welfare. List of items: hamburger, milkshake, razor, string of beads, wallet, purse, gloves, shoes, automobile, lightbulb, chair.

4. Place an "X" in the column classifying each of the listed capital goods.

Capital good	free	specialized	fixed	circulating
coal				
gaspump				
cash register				
building				
restaurant stove				
leather				
display window				
Alcoa potline				
etc.				

UNIT XVI - AMERICAN ECONOMIC SYSTEM

Part 6 - Importance of Marketing in an Economy

Length: Open

Prerequisite: Scarcity and Allocations

Description: A study of the seven functions of marketing and distribution's contribution to form, time, place, and possession utility.

Objectives:

1. The student will describe production and marketing by listing the four forms of utility and explaining each based on the following experiences:
   a. The student constructs form utility by creating, designing, writing, and publishing a five to ten page "color book".
   b. The student practices place utility when he decides what selling places are most useful to the potential consumer as a buying location.
   c. The student demonstrates time utility when he decides what times will be best for selling.
2. The student explains the seven functions of marketing when he shows the class an item of merchandise and discusses with them the marketing problems connected with distributing the item.
3. The student will be able to identify the marketing functions related to purchase of a product when he can describe how the product is bought and sold, priced, prepared for consumer use, financed at various stages, transported, stored, covered for risks (to the satisfaction of the instructor).

Sources:

Retailing: Principles and Practices, Richert, Meyer, Haines, 1968, page 1-10.
Marketing and Distribution, Mason-Rath, 1968, page 37-45.
Retail Merchandising, Wingate-Samson, 1968, page 4-11.
Marketing, Sales Promotion and Advertising, Nolan-Warmke, 1965, page 67-70.
Economics USA, Leith and Lumkin, 1968, page 206-210.
General Business for Everyday Living, Price et al, 1966, page 19-21.
Economics for Modern Living, Frieir, 1962, page 109-122.
Economics of American Living, Heckman, 1959, page 44-55, 56-66.
Distribution In Our Economy, University of Texas, page 20-27.
Consumer Economic Problems, Warmke, Wyllie et al, page 89-98, 104.

OUTLINE

I. Distribution's contribution to form, time, place, and possession utility.
  A. Distribution contributes to form utility when goods are packaged (a dozen bolts, paint in a useful size container) or altered (clothing, paint mixed to order).
  B. Distribution contributes to place utility when goods are available to the consumer at a convenient place.
    1. Involves buying, storing transportation, risk-taking
    2. Involves choosing location suitable for product
  C. Distribution contributes to time utility when goods are made available.
    1. Snow shovels must be purchased in August
    2. Other supplies must be ordered earlier than consumer demands.
  D. Distribution contributes to possession utility. Goods are not satisfying human wants until consumer possesses the goods.
    1. Gas in the gas tank
    2. Food in the shopping basket
    3. Credit and other risk taking may be involved.

II. The Seven Functions of Marketing
  A. Selling and Advertising
  B. Buying
  C. Assembling
  D. Storing
  E. Transporting
  F. Packaging
  G. Risk-taking

III. Mass Marketing is necessary for the economics of mass production to be realized.

ACTIVITIES

1. Show the class a product or item produced or manufactured. List on the chalkboard the people or agents who make buying and selling decisions in moving the product from the producer to the consumer. (An example would be: a shirt which would involve a (a) textile mill's sales representative (b) a button manufacturere's sales representative (c) transportation agent who transfers the materials (d) banker who extends credit to the shirt manufacturer (e) Shirt factory sales representative (f) wholesale shirt buyer (g) wholesale shirt sales representative (h) advertising copywriter and layout artist (i) retail salesperson (j) consumer.

2. (alternate to above) Demonstration. Select an item of merchandise to show the class and discuss with them the marketing problems connected with distributing the item (selling, transportating, etc.)

3. Assume that in your local newspaper there recently appeared a letter to the editor that was highly critical of excessive marketing costs. Among other things the letter charged that middlemen are robbing the American people to the tune of 50¢ out of every dollar. You have been asked by a group of businessmen to write a rebuttal from the D.E. Student's point of view. Write the letter in less than 300 words. Every word must count.

4. You, as a consumer, frequently purchase gasoline for your automobile. You may even be employed in a gasoline service station or be a close friend of such an employee. Using one gallon of gasoline as an example, identify specifically the marketing functions as related to the gasoline. Identify how the gasoline is:
   a. bought and sold
   b. priced
   c. refined for consumer use
   d. financed at various stages
   e. transported
   f. stored
   g. covered for risks involved
   h. graded and standardized
   (You may select a different product such as bread, milk, grain, clothing)

5. Buzz Session: · Choose three friends and attempt to determine products for which some of the marketing functions can be eliminated; to name the functions and explain why they can be eliminated. Report the results to the instructor as soon as you have undertaken this project.

6. Panel Presentation: After clearing with instructor, invite a group of businessmen, representing the different marketing functions, explain the functions their firm performs, why they perform them, the interrelationships of the functions, and why they must be performed.

7. Class Project/DECA Project
   Produce and market a color book. The color book is made by students with cartoon illustration for each topic on each page. Each cartoon is illustrative of the boy/girl with the "prettiest legs", "longest hair", "smartest", "best car/bike", "most popular", etc. Students should select topics of interest to them. Care must be taken not to offend while having fun and "biggest head" which would be offensive to the community and some students or "dumbest" or "fattest" should be avoided (1) no group has a right to inflict senseless pain on others (2) legal ramifications of recent lawsuits. Fun for all should be the theme of this activity. Accompanying the cartoon would be a statement such as: "I have the longest beard in school. Birds follow me everywhere I go. Girls like me, too. Color me 'Clairol gold'." Marketing the color book may include advertising and a publicity contest wherein students purchase a voting ballot with each colorbook. A short assembly during noon hour with appropriate awards (a bottle of rinse for "longest beard") can climax this activity. Students note each of the utilities contributed to the consumer by each part of the activity.

UNIT XVI - AMERICAN ECONOMIC SYSTEM

Part 7 - Decision Making In A Market Economy

Length: Open

Prerequisite: Instructor lectures on supply and demand curves.

Description: A study of how decisions are made in our economy.

Objectives:

1. The student will discover his function as an economic voter when he lists his purchases during the previous two weeks.
2. The student will be able to analyze the nature of economic voting when he develops in writing an evaluation of the effect of consumers on the the bicycle market. This evaluation must be approved as accurate by the local bicycle shop owner.
3. The student will be able to dramatize the functions of supply when he participates in a class auction.
4. Presented with a supply-demand curve graph, the student will be able to identify (1) supply curve (2) demand curve (3) equilibrium or market price (with 100% accuracy).
5. The student recognizes the relationship between supply and demand when he constructs a supply and demand graph for a product of his own choosing.

Sources:

Basic Retailing and Distribution, Reich, Levy, Feldman, Pitman, New York 1960, page 64-69.
Fundamentals of Selling, Wingate and Nolan, 1969, page 12-13.
Retail Merchandising, Wingate and Samson, 1968, page 27-45.
Economics of American Living, Heckman, 1959, page 44-55 (56-66 for special interest)
Distribution In Our Economy, University of Texas, page 47-50.
Economics for Distributive Education, Strietelmeier, Ohio State D.E. Materials Laboratory, page 22-27.
Economics for Modern Living, Freier, 1962, page 109-124.
Business Principles and Management, Shilt et al, page 8-11.
Marketing, Sales Promotion and Advertising, Nolan and Warmke, page 27-37.
General Business for Everyday Living, Price et al, page 29, 35-39, 72-76.
Marketing In Our Economy, University of Texas, page 5-23.
Retail Merchandising, Wingate and Weiner, page 2-6.
Consumer Economic Problems, Warmke, Wyllie, et al, page 5-6, 13-14, 29-41, 276-282, 290, 315-334.

OUTLINE

I. Decision-making is decentralized in a market economy
   A. By deciding to purchase a particular product, a consumer casts his vote.
   B. Many producers cast votes, similarly
   C. There is no need for conformity under an economic dollar-vote system as contrasted with political votes where only one candidate can win.

II. Production varies with spending by consumers as well as producers.

III. The market "adds up" the individual decisions of buyers and sellers and converts them in to aggregate forces known as demand and supply.
   A. The demand curve represents the varying amounts of a certain product that consumers will buy at various prices.
   B. The supply curve represents the varying amounts of a certain product that consumers will buy at various prices.
   C. The point of intersection of the two curves is the "price" or point at which the market will be cleared, theoretically.
   D. The market does not always work perfectly but the forces of supply and demand are always forceful.

ACTIVITIES

1. The way you spend your money helps to determine what goods and services are produced. Make a list of all your purchases during the past two weeks to show the kinds of goods and services you voted for.
2. How does your employer (or another businessman of your choice) exercise his economic vote. What kind of activities does he ask for the benefit of himself, the employee and the consumer?
3. After years of lethargy, the bicycle industry is suddenly overwhelmed with demand. During the same approximate time young people have shown a tremendously increased interest in motorbikes, also. In these instances economic votes were cast, creating a new market and adversely affecting the auto market. Imagine a situation in which young people could create a new market and/or destroy a presently existing one. Develop this situation in writing, including effects on the decisions of several people in the producing sector of the economy. Remember that satisfied wants create related wants and include dependent markets that might be destroyed or created.
4. Select a product sold by your firm. Watch the inventory and prices of the product over a period of time. What happens when demand is high and the product is scarce? What happens when inventories increase rapidly and demand falls off sharply or the market becomes saturated? Analyze what happened to supply and demand, to prices, and to sales volume. Hand in a written report of your analysis. (Examples of products to analyze are such things as phonograph records; fashion items (dresses); perishables such as seasonal fruits, meat, dairy products, costume jewelry, snow shovels.
5. Mock Action. At a time agreed upon by you and your classmates, have students bring items to class to be auctioned off. Some should be items that have no monetary value, others that have a monetary value--limit of one dollar--If possible, bring in an auctioneer, (clear with instructor) to explain the process and conduct the auction. Proceeds may go to club treasury or charity, according to result of class

vote. Analyze the prices paid for items and market forces involved.

6. Construct your own supply and demand curve for a product choosen by you.

7. Class Demonstration. (Instructor organize and withhold this from any prepared material) Divide the class into 3 groups of sellers and 3 groups of buyers. The first group of sellers will be given cards marked $4.00, the bottom price at which each may sell; the second group of sellers will have cards marked $3.00; the third group $2.00. The first group of buyers will receive cards marked $4.00, the highest price each can pay; the second group of buyers receives cards marked $3.00; the third group receives cards marked $2.00. No student may disclose the price written on his card. 15 minutes is allowed for bargaining. The item may be a simulated hit record.

UNIT XVI - AMERICAN ECONOMIC SYSTEM
Part 8 - Profit and Property

Length: Open

Prerequisite: See Activity #1.

Description: A study of profit as a dynamic factor in our economy that is coupled with private ownership.

Objectives:

1. The student examines the role of profits in attracting capital for equipment when he acts the part of a member of a utility rate commissioner and is presented with a request for a rate increase.
2. The student compares the advantages and disadvantages of investing for profit vis-a-vis savings deposit when he works a problem revealing his economic profit from a hypothetical investment.
3. The student reports and synthesises the attitudes of some people to profits when he constructs and administers a survey on the subject and reports the results.
4. The student discovers the use of profits for productive capacity when he role plays the member of a board of directors formulating a plan for division of profits between dividends and retained earnings.
5. The student examines the actual rate of profit when he inspects the financial report of three corporations and reports the percentage of profit.
6. After making a list of personally owned property, the student differentiates between property that is personal and that which has capital potential and projecting aspirations for capital acquisition in the future.

Sources:

Consumer Economic Problems, Warmke, Wyllie, et al, page 34-40, 365-376, and 393-413.

Retail Merchandising, Wingate-Weiner, page 2-6.

"Economic Ideas and Concepts", Joint Council on Economic Education

"Some Concepts Essential to a Basic Understanding of Economics", Barron and Hoff, Southwestern Monographs, page 1-26.

Profits in the American Economy, U.S. Department of Commerce,1965 (Order from Supt. of Documents, U.S. Government Printing Office, Washington D.C. 20402 25 cents.

A Primer on Profits, Kaiser Aluminum News, Volume 21, Number 4, Kaiser Aluminum and Chemical Corporation, Kaiser Center, Oakland, California

OUTLINE

Definition. Profit is the income resulting from risk capital and that which is left over after all costs have been paid.

I. What profits do for the economy
   A. Profits attract and provide needed capital and savings to pay for labor, machinery, land, buildings, raw materials, transportation, communication facilities, expansion and working capital, losses.
   B. Profits direct investment.
      1. Company's profits are generally higher when consumer demand for its products and services is high.
      2. Improved methods and greater efficiency result in lower unit cost.
      3. Profits help guide the flow of risk capital from investors to companies.
   C. Profits and business risks.
      1. There must be a possibility of earning a profit or there would be:
         a. No new products developed
         b. No new equipment installed
         c. No research done
         d. No new jobs
   D. Profits promote efficiency
      1. keep costs down
      2. keep prices down
   E. Profit can be the factor that will help our economy achieve its goals.
   F. Proportion of GAP is low. In 1967 only 3% for dividends.
   G. Profit is the incentive that encourages producers to produce.
   H. Profit is so dynamic and powerful that we have found we have to exercise control of it. It's motivation can be compared to a lively horse that needs reining but, if choked, will take us no place.

II. Private Property
   A. Safeguarded by the 4th Amendment to U.S. Constitution
   B. Considered a human right
      - the fruit of one's labor and cannot be taken away by force and an assault on one's person--Loeke
   C. Diffusion of ownership and control of property among many individuals (as appossed to government) gives many "do your own thing" economic votes and diffuses power.
   D. Profit is the reward from using private property in a way useful to society.

ACTIVITIES

1. What do you own? Make a list. Differentiate between personal property and capital. What capital might you acquire in the future?

2. Describe the effects of profit on the activities of the firm with which you are associated. Consider the effect on employment of workers, investment in goods and fixtures, satisfaction and morale.

3. Survey of Attitudes Toward Profits. Use the following questions and others that you may think pertinent and ask 25 students at random and 10 adults at places other than highschool: (See attached sample)
    a. Do you think that a business firm has a right to make a profit?
    b. What percent of each sales dollar should a business firm receive as profit?
        1-5%, 6-10%, 10-20%, 20-30%, 30-40%.
    c. What percent do you think is actually received as profit? (above)
    d. What percent of profit do you think is reinvested in better tools for better jobs?
        5%, 10%, 20%, 30%, 40%, 50%, or more.
    e. What percent is "take-home" profit (net)? (above)
    f. A store buys a phonograph record for 60 cents and sells it to you for $1.00. How much net profit do you think the store makes on this sale after paying all its expenses?
    g. Could our economy operate without profits?
    h. How do people get in the habit of saving?
    i. How do people get in the habit of investing?
4. Check the financial report of three corporations. What was the percentage of profit made by each? Where does one get them?

5. If profit is reward for risk taking, profit expectations should be highest when risk is greatest. List five types of business in which risks (and profit expectations) are greater than in most businesses.

6. Select three other students and brainstorm: "How to get people into the habit of saving and investing." List ideas and be prepared to present them to class.

7. Class Discussion: It is recommended that the instructor procure a copy of the 67-8 NADET Project "Profits". It is a useful overhead projection overlay with discussion guide. Lacking this, the instructor should preceed this part with a discussion of his own or with a talk by a downtown faculty member.

8. You have operated a business for one year. Your total initial investment in merchandise plus cash on hand was $25,000 which you had saved over a period of years. At the end of the year, you earned a net operating profit of $1,600. Assume the going rate of interest on investments to be six percent.
    What was your economic profit (or loss)?

    Answer____

(No. 8 con.)
Would you have been better off to have worked on a paid job and invested your money in a credit union or bank? Explain.

9. Prepare a talk on "Profits and the job I hold" or "Profits and the job I expect to hold in the future".

10. Role Playing: Assume that you are on the board of directors and are to participate in the formulation of a plan for the division of profits. The board will decide how much earnings to set aside as "retained earnings" and how the retained earnings so set aside will be used. Uses of retained earnings to be considered will include: possible expansion, purchase of equipment, replacement of worn-out equipment, research and development. See instructor for details.

11. List the uses of taxes in the community, state and federal governments and determine what proportion of these taxes come from profits.

12. A representative of a utility company has come to request a rate increase to the consumers for the services of the utility. The company has a reputation for faulty equipment and poor service, and it is the contention of the representative that a mammoth increase in capital is necessary to replace faulty equipment with better equipment. However, only part of the capital can be financed with a loan. It is the judgement of the board of directors of the company that a new issue of stock should be floated but that prospective investors will be frightened away by the present low rate schedule and a higher rate schedule will promise greater profits. This would make the utility an attractive investment and support the stock sale. Consumer groups and some news media and politicians have already begun complaining that rates are already too high and the company should not "be favored with a rate increase." YOU are on the commission that is going to decide. Choose three students to serve on the commission with you. If needed, the instructor will play the role of utility representative, banker, consumer group, and others. Write up your decision, giving reasons.

UNIT XVI - AMERICAN ECONOMIC SYSTEM
Part 8 - Profit and Property
Activity 4

SURVEY OF ATTITUDES TOWARD PROFITS

1. Do you think that a business firm has a right to make a profit?

Yes_____ No_____

2. What percent of each sales dollar should a business firm receive as profit?

1-5%_____ 6-10%_____ 10-20%_____ 20-30%_____ 30-40%_____ 40-50%_____

3. What percent do you think is actually received as profit?

1-5%_____ 6-10%_____ 10-20%_____ 20-30%_____ 30-40%_____ 40-50%_____

4. What approximate percent of profit do you think is reinvested in better tools?

5%_____ 10%_____ 20%_____ 30%_____ 40%_____ 50% or more_____

5. What percent of profit is "take-home" or net profit?

5%_____ 10%_____ 20%_____ 30%_____ 40%_____ 50% or more_____

6. Assume that a store buys a phonograph record for 60 cents and sells it to you for $1.00. How much net profit do you think the store makes on this sale after paying all its expenses?

__________cents

7. Could our economy operate without profits?

Yes_____ No_____

8. How do you believe people get in the habit of saving?

9. How do you believe people get in the habit of investing savings in things other than insurance, credit unions and banks?

UNIT XVII

BUSINESS LAW

Part 1 Contracts

2 Personal Property

3 Real Property

4 Employer-Employee Relations

5 Government Regulations

6 Business-Consumer Relations

UNIT XVII - BUSINESS LAW
Part 1 - Contracts

Length: Open

Prerequisite: Instructor introduces the need for contracts in business.

Description: A study of the types of contracts.

Objectives: 1. At the completion of the unit, each student will be able to name the five elements of the contract and underline them in a contract provided by the instructor.
2. At the completion of the unit, each student will be able to name seven of the eight kinds of contracts, and demonstrate, either in writing or class presentation, four of the eight kinds.

Sources: *Essentials of Business Law,* Rosenberg and Crank, 3rd Ed., page 31-50.

OUTLINE

I. Contracts
  A. Elements
    1. Competent parties
    2. Mutual agreement
    3. Legal
    4. Consideration
    5. Proper form
  B. Kinds
    1. Oral
    2. Written
    3. Express
    4. Implied
    5. Executed
    6. Executory
    7. Formal
    8. Simple

ACTIVITIES

1. The instructor is to supply a contract for each student. Each student will identify the five elements.

UNIT XVII - BUSINESS LAW
Part 2 - Personal Property

Length: Open

Prerequisite: General knowledge of the law of contracts.

Description: A preview and study of the ways to acquire personal property.

Objectives:
1. At the completion of the unit, each student can name at least seven of the eight ways to acquire personal property.
2. At the completion of the unit each student will either demonstrate in writing to the instructor or before the class six of the eight ways to acquire personal property.
3. Each student will demonstrate one type of warranty.

Sources: Essentials of Business Law, 3rd Ed., Rosenberg-Crank, page 145-161.

OUTLINE

I. Personal Property
  A. Ways to acquire personal property
    1. Purchase
    2. Gift
    3. Will
    4. Finding lost or mislaid
    5. Occupancy
    6. Government consent
    7. Operation of law
  B. Types of personal property contracts
    1. Contracts of sale
    2. Contracts to sell
    3. Bailment
    4. Barter
  C. The law of sales
    1. Statute of Frauds in sales contracts
    2. Bulk sales acts.
  D. Warranties in sales contracts
    1. Express warranty
    2. Implied warranty
      a. Implied warranty of title
      b. Implied warranty of quality
      c. Implied warranty against latent defects
      d. Implied warranty of fitness for known purpose
      e. Implied warranty in sale by description or sample
      f. Absence of implied warranty in patents or trade names.

E. Personal Laws
   1. The law in your life
      a. Age 18 rights and responsibilities
      b. How laws are made
      c. Marriage
      d. Remedy at law in personal rights.

ACTIVITIES

1. The instructor lists the eight ways to acquire personal property on the chalk board in his introduction of the unit. Then asks for the members of the class to bring from home or any other source the forms used in acquiring personal property. All the people involved in these transactions will be included in the discussion.

2. From newspapers, magazines, or your daily experience, find examples of contracts of sale and contracts to sell.

3. Make a bulletin board display showing how the following differ: A contract of sale, a contract to sell, a bailment, and a barter.

4. Prepare a diagram or a chart with pictures, showing the legal obligations of a seller under the Bulk Sales Act.

5. Try a "pro" and "con" argument on the question: "Resolved, that the Statute of Frauds shall apply to all contracts for the sale of goods."

6. Collect as many warranties as you can find that are attached to specific products (such as electrical appliances, clothing, and machinery). Bring these express warranties to class and discuss them.

7. Make a list of products that are commonly the subject matter in sales contracts. For each product indicate the specific warranties implied by law.

UNIT XVII - BUSINESS LAW
Part 3 - Real Property

Length: Open

Prerequisite: A general knowledge of the law of contracts.

Description: The study of the nature, transfer, mortgaging, and leasing of real property. This unit includes the law of wills and intestacy, also.

Objectives:
1. At the completion of the unit each student will have completed the steps in the process of buying a home within his personal budget. They will have received title, borrowing the amount of money required to buy their home.
2. Each student will have leased his home.
3. Each student will have made a will.

Sources: Essentials of Business Law, 3rd Ed., Rosenberg-Crank, page 200-219.

OUTLINE

I. Real Property
   A. Nature of real property
      1. Classifying fixtures
      2. Types of ownership
         a. Estate in fee simple
         b. Joint tenancy
         c. Tenancy in common
      3. Limitations on ownership
         a. Easements
         b. Water rights
         c. Air rights
         d. Right of eminent domain
         e. Police power
      4. Transfer or real property - Deeds
         a. Requirements of a deed
         b. The full warranty deed
      5. The mortgaging of real property
         a. Rights and duties of mortgager
         b. Rights of mortgagee
      6. Leasing of real property
         a. Kinds of tenancy
            (1.) Tenancy for a definite period
            (2.) Tenancy from year to year

            (3) Monthly tenancy
            (4) Tenancy at will
        b. Rights and duties of landlords
        c. Rights and duties of tenants
        d. Termination of lease
B. The law of wills and intestacy
    1. Validity of wills
    2. Codicil to a will
    3. Probating a will
    4. Intestacy

ACTIVITIES

1. The instructor is to provide each student with an earnest money agreement. The class will divide themselves in working units, class decides the number in each unit, fills out earnest money. The student is buying a home, stay within your budget.

2. The students select a speaker from the speaker bureau (refer to personal finance unit), either a real estate broker, or mortgage broker. He speaks to the class on the legal aspects of buying a home.

3. The students will prepare a bulletin board display, using real estate deeds. Include in the display the requirements of a deed and the covenants contained in the deed.

4. The instructor will work out with the class, the students expected to bring to class samples of mortgage notes and mortgage documents. Discuss the rights and responsibilities of the parties.

5. The class will select a lawyer to discuss with them the topic, "Why everyone needs a will."

UNIT XVII - BUSINESS LAW
Part 4 - Employer-Employee Relations

Length: Open

Prerequisite: An introduction by the instructor naming and defining these laws.

Description: In studying these laws the student involvement in the activities will more clearly name and define them as to purpose.

Objectives: 1. At the completion of the unit each student will be able to state in writing how the following laws are financed and the application of the law.
   A. Workman's compensation laws
   B. Rights and procedures
   C. Wage and hour laws
   D. Social Security Act
      (1) Unemployment insurance
      (2) Old age, survivors, and disability insurance
      (3) Public assistance

Sources: Business Law, 4th Ed., George Gelz, page 382-396.
Applied Business Law, 9th Ed., Fisk-Snapp, page 358-384, 454-468.

OUTLINE

I. Laws governing employer-employee relations
   A. Workman's compensation laws
   B. Rights and procedures
   C. Wage and hour law
   D. Social Security Act
      1. Unemployment insurance
      2. Old age, survivors, and disability insurance
      3. Public assistance
      4. Medicare

ACTIVITIES

1. The student selects a speaker from their bureau (refer to unit on Personal Finance), either an attorney ~~or~~ from the Social Security Office. Topic--Discussion of the laws named in the objective.
2. After discussion of material referred to in the source of information and after discussion with the speaker, the instructor makes a test on the financing and application of the laws. Each student is expected to pass the test 75% or better.

UNIT XVII - BUSINESS LAW
Part 5 - Government Regulations

Length: Open

Prerequisite: Introduction and discussion by the instructor on the meaning of Government Regulations.

Description: Locate, review and show how these regulations improve the welfare of the individual.

Objectives: 1. At the completion of this unit each student will have received a participation grade in the discussion and application of the Federal State and Local government regulations in business.

OUTLINE

I. Government Regulations
   A. Influence on business

Federal	State	Local
1. Constitution gives congress authority to regulate interstate commerce.	1. Powers not covered under the constitution are left to the states, as they control intrastate.	1. The lower levels of responsibilit are by the count secondary roads, sewage, police, sanitary distric etc.

   B. Government protection of originality - (Patents)

Federal	State	Local
1. Patents		
2. Copyrights		
3. Trade-marks		

   C. Restrictions of business practices

Federal	State	Local
1. Standards of weights and measures		
2. Quality standards		
3. Grades		

   D. Location and Construction

Federal	State	Local
	1. Supervision	1. Zoning

E. Unethical practices

Federal	State	Local
1. Fed. Trade Commission	1. Printer's Ink Model Statute	1. Ordinances
		2. Building codes
		3. License

F. Expansion of businesses

Federal	State

Two main types of expansion that may be on all levels.
1. Monopolies
2. Oligopolies

To control these expanded organizations of business, we have two main pieces of legislation:
1. The Sherman Antitrust Act - 1890
2. The Clayton Antitrust Act - 1914

These can be demonstrated in the same display.
1. Pools - National
2. Cartels - International

These organizations can also be demonstrated

G. Government controls of competition and prices.

Federal	State	Local
Interstate Com. Commission	Fair Trade Legis.	
Maritime Commission	by taxes--sales, use.	
Civil Aeronautics Board	License fees	
Fed. Power Commission		
Fed. Communications Com.		
Securities and Exchange Comm. through the Public		
Scrutinize combinations among public utilities		
Fair Trade Legislation		

H. The Government and Finance

Federal	State	Local
Commercial banks	Banking usury laws	
Members of Fed. Reserve System	Licensed personal finance companies	
Federal Reserve Board	Inspectors for banks	
U.S. Comptroller	Inspectors for finance co.	
Fed. Deposit Ins. Corp.	Blue Sky laws	
U.S. Securities & Exch. Comm.	License for selling	
Natl. Small Bus. Admin.	Stocks and bonds	
	License for selling insurance	

I. Government and Debtors

Federal	State	Local
Bankruptcy laws	State courts	

J. Government and Labor - Management Relations

Federal	State	Local
Taft-Hartley law	1. Some state laws come closer to Wagner Act 1935. Right-to-work laws.	
Federal Mediation Service	2. Minimum wage	
Federal Fair Labor Standards Act	3. Employment-practices law	
	4. Mode of paying employees	
	5. Prohibits discrimination because of sex	
	6. Safety and sanitation laws	
	7. Workmen's compensation	
	8. Unemployment insurance	
	9. Disability insurance	

K. Government source of business information

Federal	State	Local
Accounting advice	1. Dept. of Industry and Commerce	Better Business Bureau
Statistical Information		Chamber of Commerce
Documents, US Printing Office		Trade Associations
Pamphlets and booklets		

UNIT XVII - BUSINESS LAW
Part 6 - Business - Consumer Relations

Length:	Open
Prerequisite:	Introduction and discussion by the instructor on the need for better relations between business and the consumer.
Description:	Locate and review the laws and agencies that will improve the welfare of the individual.
Objectives:	1. At the completion of this unit each student will be able to name and give an illustration of the Washington consumer laws pertaining to him as a consumer, and also businesses' responsibility in the law, with a 90% proficiency. 2. At the completion of this unit each student will have collected the information from each of the agencies mentioned in the unit pertaining to his remedies at law concerning consumer protection, one piece of information from each agency considered as the measurable response.
Sources:	Consumer Protection, Garnishment, Guide to Retailers, Association of Washington Business. Consumer Alert, Attorney General, State of Washington Bunco, Red Rudensky, Peoples National Bank.

OUTLINE

I. Business - Consumer Relations
  A. Washington consumer laws
    1. Business
    2. Consumer
  B. Remedies for these laws
    1. Attorney General's Office
    2. Federal and State
      a. Trade commissions
      b. Post Office
      c. Insurance commission
      d. Better Business Bureau
      e. Chamber of Commerce
      f. Trade and professional organizations
      g. Prosecuting Attorney
      h. City Government offices
      i. The business man is the first place to go.

ACTIVITIES

1. Have selected students visit at least one of the agencies that can give assistance to consumers regarding his rights also relations with business; and report to the class.

2. Test the students on the application and businesses' responsibility regarding the latest consumer laws of the state.

3. Have selected students obtain information from each agency mentioned in the lesson.

UNIT XVIII

BUSINESS ETHICS

Part 1 Ethics in Relation to Goods Sold
2 Ethics in Relation to Customers
3 Ethics in Relation to Fellow Workers
4 Ethics in Relation to Employee and Employer
5 Ethics in Relation to Employer and Employee
6 Ethics in Relation to Competition
7 Ethics in Relation to Suppliers

NOTE TO INSTRUCTOR

Definition:
Rules of conduct for a particular group; a systematic study of moral choices and of moral standards by which right decisions are made.

UNIT XVIII - BUSINESS ETHICS

Part 1 - Ethics In Relation To Goods Sold

Length: Open

Prerequisite: A class discussion onthe definition of ethics, the place of ethics in business and the need of business to provide their own guide lines to ethical behavior.

Bring out differences between ethical polieies and business policies as set up in studies on store policies.

Description: A study of ethics in relation to goods sold.

Objectives: On completion of this lesson you will be able to:

1. Identify at least 5 ways to honestly represent merchandise to the customer.
2. Define warranty
3. Identify flaws of construction in merchandise furnished by the teacher (or opposite approach - point out good construction)
4. Define Ethics

Sources:

Business Principles and Management, 4th Ed., Shilt-Wilson, page 44-45.
Business Principles, Organization and Management, Tonne-Simon, page 428-444.
Retail Merchandising, 7th Ed., Wingate-Samson, page 409-410.
Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 350.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 98-100
See unit on Business Law for further information
Business Etiquette Handbook

OUTLINE

Ethics In Relation To Goods Sold

I. Honesty represented as to:
   - a. Value
   - b. Quality
   - c. Use
   - d. Service
   - e. Warranty

II. Representing goods by:
   - a. Direct selling
   - b. Advertising

ACTIVITIES

1. Make a collection of newspapers, magazine or flyer ads. By working in groups of 3 or 5, check out each ad by going to the store in question and find out:

   a. Do you find it is honestly represented?
   b. Is the illustration (if any) an honest one-or is it mis-leading?
   c. Was there anything not said that should have been?
   d. What is your conclusion as to business honesty as to goods in your community?

2. Select any 3 articles of merchandise about which you can obtain information regarding warranties and guaranties. There may be a part of the advertisement, on the tag or label, or in the form of a printed contract.

   For each - give name of article and exact words of warranties or guarantee.

   Arrive at a definition of warrantee and guarantee.

3. Case Study

   Mrs. Stone is a newly-wed of 3 months and has had very little experience in buying furniture. She has decided to buy a dining room set in maple. She goes to a charge furniture store and asks to see maple dining room sets. She selects one she likes and asks if it is real maple. She is assured by the salesman it is. It is delivered to her home and on its first use a dent was made in the surface when the lid of the sugar bowl fell off. A friend said she should have purchased "hard rock" maple. She said she thought she had. They looked under the table and found a stamp - "White pine with maple finish". She returned the set. The store did not accept it saying at no time did the term "hard rock" come into the sales talk.

   Who is at fault? The store - the salesman - or the customer?

UNIT XVIII - BUSINESS ETHICS
Part 2 - Ethics In Relation To Customers

Length: Open

Prerequisite: See Part 1

Description: A study of ethics in relation to customers.

Objectives: On completion of this lesson, you will be able to:
1. Define high pressure selling
2. Name at least 4 ways a salesperson can show good ethics in their treatment of a customer
3. Write a set of ethics for their place of employment on treatment of customers.

Sources: Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 109, 278-280.
Marketing, Sales Promotion and Advertising, 7th Ed., Nolan-War page 221-230.
Marketing and Distribution, Mason-Rath, page 439.
Retail Merchandising, 7th Ed., Wingate-Samson, page 332, 350.

OUTLINE

Ethics In Relation To Customers
1. Be truthful
2. Free from high pressure selling
3. Avoid tricky devices
   a. Trade-in allowances
   b. Exaggerated comparative prices
   c. Free offers
4. All customers treated alike
5. Respectful and sympathetic attitude at all times.
6. Accidents and injuries

ACTIVITIES

1. By means of group study and discussion come up with a list of ethical behavior for the store and its personnel in relation to the treatment of customers. Stick within the definition of ethics as previously established.
2. Make a collection of newspaper ads showing comparative prices. Do any of them seem illogical? If possible make a visit to the store and then do some comparison shopping on your own before arriving at a decision.

3. Make a study of the practice of "free offers". Find as many as you can from newspaper ads, magazines, flyers, radio, T.V. Include merchandise sales, land sales and services.

   a. Do they follow through?
   b. What strings, if any, are attached?
   c. Is the practice legal?
   d. Do you as a customer like this practice?

   Why or why not? (It might be well to do some interviewing here with adult acquaintance)

UNIT XVIII - BUSINESS ETHICS

Part 3 - Ethics in Relation To Fellow Workers

Length: Open

Prerequisite: See Part 1.

Description: A study of ethics as it effects you and your fellow worker.

Objectives: On completion of this unit you will be able to:

1. Draw up a course of action on ethical behavior that will help you in getting along with your fellow worker.
2. Define and give examples of sales grabbing.

Sources: Business Principles and Management, 4th Ed., Shilt-Wilson, page 558-559.
Retail Merchandising, 7th Ed., Wingate-Samson, page 621-623.
See unit on "Job Performance"

OUTLINE

Ethics In Relation To Fellow Workers

1. No sales grabbing
2. Fair share of stock work and non-selling tasks
3. Courtesy to fellow employees

ACTIVITIES

1. Interview at least 10 people now working and find out if there have been any problems with fellow worker. List all of them and determine which would fall into the classification of ethical behavior. Be prepared to present your finding to the class.

2. What is ethical in relation to non-selling duties between you and your fellow worker? Write this as a code of behavior.

3. Case Study

G

UNIT XVIII - BUSINESS ETHICS
Part 4 - Ethics Of The Employee To Employer

Length: Open

Prerequisite: See Part 1.

Description: A study of guides to ethical behavior of the employee in relation to his employer.

Objectives: On completion of this study the student should be able to write down a code of behavior that will help him in his relations with his employer.

Sources: Retailing Principles and Practices, 5th Ed., Richert-Meyers, page 95-99.
Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 248-250.
Marketing and Distribution, Mason-Rath, page 524-525.
Business Etiquette Handbook, page 21-41.

OUTLINE

I. Ethics In Relation To Employer
   A. What the employer expects
   B. Store Rules and Regulations
   C. How to terminate employment

ACTIVITIES

1. Work in groups of 3 or 4 and come up with a set of questions to ask employers on what they expect of employees. Interview and compile results. Of this list, which would you classify as ethical in behavior?

2. By means of interviews, reading and small group discussion, come up with ethical behavior in relation to quitting your job.

UNIT XVIII - BUSINESS ETHICS
Part 5 - Employer To Employee Ethics

Length:	Open
Prerequisite:	See Part 1
Description:	A study of what the employer can and should expect of an employee in relation to ethical behavior.
Objectives:	At the completion of this lesson, the student will be able to compile a list of ethical code of conduct that would be good for an employer to follow in dealing with his employee.
Sources:	Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 249. Retail Merchandising, 7th Ed., Wingate-Samson,page 617-619. Business Principles and Management, 4th Ed., Shilt-Wilson, page 607-609. Business Etiquette Handbook, page 43-54. Refer to unit on Business Law

OUTLINE

I. Ethics In Relation Of Employer To Employee
  A. Working conditions
  B. Existing laws
  C. Rest breaks - lounge facilities
  D. Dismissal codes
  E. Personal moral codes
  F. Evaluation of employee

ACTIVITIES

1. Case Study

The Bonton Dept. Store hired John Doerman to make deliveries. After making a delivery, he drove the truck to a friend's home, picked him up, then went swimming. In pulling away from the swimming pool parking lot he backed into another car and caused considerable damage. He was fired by the Bonton. Do you agree? There was nothing in writing about milage on company trucks.

2. Pretend you are an employer. Write down the codes of ethics you would follow in dealing with your employees.

3. Case Study

Sara DeLong worked for a drive-in where she took orders, did some short order cooking, cleaned, made change, etc. This was her first job. Sara liked her work so was hurt and surprised when called aside by the manager and told they could no longer use her as business was off. Another girl was hired within three days. Was Sara's reaction justified? Was the employers reason valid? Why do employers often use this reason for firing? What could have been the real reason for firing Sara?

4. Case Study

Joe Appleton works for a wholesaler of auto parts. He overheard the manager of his division quote a price that he knew to be way below list price. He knew this customer to be a personal friend of the manager. Joe soon had an opportunity to do the same thing for one of his friend. He was caught and fired. Would a good code of conduct have helped in this situation? Should Joe have reported the manager? How?

UNIT XVIII - BUSINESS ETHICS
Part 6 - Ethics In Relation To Competition

Length:	Open
Prerequisite:	See Part 1
Description:	A study of codes of moral behavior between a business and his competitors.
Objectives:	On completion of this lesson, a student will be able to draw up a code of behavior that would be of benefit to a business man in dealing with competitors.
Sources:	Fundamentals of Selling, 9th Ed., Wingate-Nolan, page 107, 230. Retail Merchandising, 7th Ed., Wingate-Samson, page 552.

OUTLINE

I. Ethics In Relation To Competition
   A. Do not "knock" competitors
   B. Do not hire competitors' employees unfairly
   C. Avoid "price wars"
   D. Avoid use of "loss leaders"

ACTIVITIES

1. Write a paper on price war and make a report to class.

2. Be prepared to discuss why it is considered poor business to degrade, belittle or condemn competitors.

3. Define "loss leaders" in terms of ethical behavior. Give several examples of loss leaders. Try to find an example in your community. Do loss leaders damage the business of the competitors, the customers? Explain. Make an oral report to class and/or prepare a paper.

UNIT XVIII - BUSINESS ETHICS
Part 7 - Ethics In Relation To Suppliers

Length: Open

Prerequisite: See Part 1.

Description: Relationships with suppliers.

Objectives: On completion of this lesson, the student will be able to list codes of conduct for a businessman in dealing with suppliers.

Sources: Retail Merchandising, 7th Ed., Wingate-Samson, page 229-232,558-559
Business Principles, Organization and Management, 2nd Ed., Tonne-Simon, page 96.

OUTLINE

I. Ethics In Relation To Suppliers
  A. Fairness in return goods requests
  B. Fairness in cancelled orders
  C. Fairness in demanding concessions
    1. advertising allowance
    2. prices
    3. dishonest shortage reports
    4. unfair delivery schedules
  D. Copying new ideas and styles.

ACTIVITIES

1. Case Study

A buyer ordered three dozen pairs of men's black shoes. Before the shipment arrived, the price for the shoes dropped and the buyer knew he would take a loss. When the goods arrived, 32 pair were black and 4 were brown. The buyer returned the whole shipment. Was he ethical? Give reasons for your answer.

2. Case Study

A buyer for a large department store was found to be accepting Christmas gifts from suppliers. He was called on the carpet by his employer. Do you believe there is anything wrong in accepting gifts? Would the value of gift make a difference?

3. Make a list of concessions often asked by a buyer of his supplier. Get information from references supplied and/or by interviewing a buyer. From this list, how would you determine what is ethical in asking for concession?

UNIT XIX

7

PERSONAL FINANCE

Part	1	The Personal Budget
	2	Bank Services
	3	Savings
	4	Credit
	5	Insurance

NOTE TO INSTRUCTOR

Income Tax: It is recommended that instruction on income tax be covered as part of this unit. Excellent materials including instructors guides and student kits are available from local Internal Revenue Offices:

UNIT XIX - PERSONAL FINANCE
Part 1 - Personal Budget

Length: Open

Prerequisite: The instructor introduces the unit by establishing with the students the desires and needs of man, which are the items in the personal budget.

Description: Study in detail the nine personal budget items suggested in the outline. Each student is to use $120 or estimated income at graduation, per week, in making his budget.

Objectives:

1. At the completion of this unit each student can name 8 out of 9 items and include the percent budgeted for each item as designated by the censensus of the group.
2. By the end of the unit representatives from each of the nine budget areas will have been contacted and encouraged to support vocational education in general. All the students will have made at least one contact. This serves as a means to establish the leadership in the club.

Sources:

Retail Merchandising, Wingate-Samson, page 122-126.
Moderns Make Money Behave, Education Division Institute of Life Insurance
Personal Money Management, Seattle First National Bank.

Speaker: The local bankers
Students' Choice
1. Savings
2. Credit

Speaker: Insurance agents (programming)
1. Insurance
2. Savings
3. Other disposable income

OUTLINE

I. Personal Budget
   A. Food
   B. Shelter
   C. Clothing
   D. Transportation
   E. Recreation
   F. Insurance
   G. Savings
   H. Taxes
   I. Credit

ACTIVITIES

1. Divide class in three groups: (1) spending for needs, (2) savings, (3) advancements--as to their interest. Each group read and discuss handouts.

2. Brain-storming
   1. Spending for needs--food, shelter, clothing, transportation, credit.
   2. Savings--type, short range, long range, taxes.
   3. Advancements--recreation, education, vacation.
   4. Each group selects a speaker, writes questions for the speaker to answer.

3. Search for and organize a speaker's bureau. This is done in pairs, by appointment, in the business community. They have a need now for speakers in the areas mentioned above.

UNIT XIX - PERSONAL FINANCE
Part 2 - Banking Services

Length:	Open
Prerequisite:	The instructor introduces the unit by starting discussion on the services of a bank.
Description:	A study of the three major services of the bank. a. They accept and safeguard money deposited with them. b. They transfer money payments made by check. c. They make loans to individuals, businesses, and governments.
Objectives:	

On completion of this lesson the student will:

1. Each student opens an account, writes at least one check, makes out a loan application and is introduced to one bank employee. The method of doing this is left to the instructor.
2. All of the students are expected to pass a test prepared by the instructor with a proficiency of 80% or better on the services performed by banks.
3. Each student will reconcile or balance checking account.

Sources: General Business for Everyday Living, Price-Musselman-Hall, 3rd Ed., page 171-231.

OUTLINE

I. Bank Services
   A. Accept and safeguard money
      1. Deposits
   B. Transfer money payments
      1. Checks
         a. Certified
         b. Cashier's
         c. Traveler's
      2. Money orders
         a. Postal
         b. Bank
         c. American Express
         d. Telegraphic (Western Union)

ACTIVITIES

1. The instructor is to supply the students with all the forms used in borrowing money, with transferring money, and the different types of money orders. The organization within the class will be done by the class.

   Some alternates of action are to use a banker as a speaker, build a display bulletin board.

2. Shopping around for money.

   Given each student: Factors--$500 for one year, repay monthly. The student interviews as many lending sources as he can find in his area.

   Find: Rate charged, percentage charged, penalties for paying early, penalties for getting behind in payments, collateral required. Student charts the comparisons of his findings and presents to class.

UNIT XIX - PERSONAL FINANCE
Part 3 - Savings

Length: Open

Prerequisite: The instructor introduces the unit by opening the discussion with the idea of a savings plan on three levels.

Description: A survey in priorities of methods of savings as recommended by the authorities in the investment world.

Objectives:

1. At the completion of the unit each student will have at his disposal a program of saving as recommended by the authorities geared to his personal budget.
2. All the students will be able to pass a test developed by the instructor on the three types of savings--insurance, investments, speculation--with an 80% proficiency, or better. Ref. New York Stock Exchange.
3. At the completion of the unit each student will be able to name 5 of the 7 ways of investing, listing them in order of preference when you are beginning a savings program.
4. At the completion of the unit, considering holdings of individuals in four types of investments: commercial banks, mutual savings, savings and loans, U.S. Savings Bonds---from 1956-1964. All the students in the class will be able to pass a test provided by the instructors with a proficiency of 80% or better---the activity is located in the investment reference, page 249-250.

Sources: You and the Investment World, New York Stock Exchange.
General Business for Everyday Living, Price, Musselman, Hall, Weeks, 3rd Ed., Part 33 - Life Insurance, page 302-311;
Also parts 26-29, page 234-271 refers to savings in investments.

OUTLINE

- I. Savings
  - A. Insurance
    - 1. What to buy
    - 2. Amount to buy
  - B. Investments
    - 1. Savings account
    - 2. Bonds from Government or corporation
    - 3. Savings in a home or other real estate
    - 4. Buy business enterprises
    - 5. Purchase shares of stock in corporations
    - 6. Shares in a private company

7. Investing savings in life insurance

C. Speculation

ACTIVITIES

1. The type of insurance to buy is determined by the percent agreed on by the group, not an exact percent, but within a range--example 2-10 depending on the wants and needs and ability to pay of each individual. The amount of insurance sold as to type in force in the U.S., demonstrated by bar graph on page 309 in ref. General Business for Everyday Living, helps the students decide the amount of money they should spend for insurance. What each type will do for the individual is stated in the same reference on page 302-311. The amount of this type is determined by the percentage range allowed in the budget.

2. Test on the 7 ways of investing made by instructor.

3. Speaker--from one of the four types of investment--commercial, bank, mutual savings bank, savings and loan, or U.S. savings bonds. Will discuss and explain each, giving some advantages and disadvantages, preparing the students for the test asked for in the fourth objective.

UNIT XIX - PERSONAL FINANCE
Part 4 - Credit

Length: Open

Prerequisite: The instructor introduces the unit discussing the need for consumer credit.

Description: The study of the types of consumer credit, their purposes, and costs to the consumer. There are also combinations of the two types.

Objectives:

1. Each student will be able to name the two types of consumer credit.
2. At the completion of the unit each student can give the purpose for each type and compute the dollar cost and annual percentage of installment credit.

Sources:

General Business For Everyday Living, Price, Musselman, Hall, and Weeks, 3rd Ed., page 126-170.
Retail Merchandising, Wingate-Samson, 7th Ed., page 156-179.

OUTLINE

I. Credit
  A. Consumer credit
    1. Non-installment
    2. Installment

ACTIVITIES

Divide the class--each group elect a chairman or speaker.

1. Group 1 takes non-installment credit.
2. Brings charge plates and credit cards to class.
   - a.How are they secured?
   - b. Where?
   - c. Who can get them?
   - d. The conditions under which they may be used?
3. Group 2--takes installment credit
   - a. Define it
   - b. Bring applications to class--and apply for credit using the three "c's" of credit applying the applications to their budgets.
   - c. Computing the cost in dollars, and also annual percentage rates charged.

4. Groups 1-2 come together, Group 1 with a panel from the group explains and demonstrates non-installment credit to Group 2.

5. Group 2 explains and demonstrates installment credit to Group 1----in a like manner.

UNIT XIX - PERSONAL FINANCE
Part 5 - Insurance

Length: Open

Prerequisite: Instructor will explain and name types of risks that can be secured by insurance.

Description: To study the purposes and kinds of policies found in life, casualty, and health insurance.

Objectives: At the completion of the unit each student will demonstrate his knowledge of life, casualty, and health insurance by presenting to the instructor in writing at least two purposes, two types of policies, and in addition regarding life insurance, two kinds of companies. These purposes and policies would apply to the individual student within his budget.

Sources: General Business for Everyday Living, Price, Musselman, Hall and Weeks, 3rd Ed., page 302-311, 274-301, 339-347.
Retail Merchandising, Wingate-Samson, 7th Ed., page 127-133.

OUTLINE

- I. Insurance
  - A. Life
    - 1. Purpose
    - 2. Types of policies
    - 3. Kinds of companies
  - B. Casualty
    - 1. Purpose
    - 2. Types of policies
  - C. Health
    - 1. Purpose
    - 2. Types of policies

ACTIVITIES

1. The students will divide the class into workable units (or leave this to the instructor) then accept an application for insurance from the instructor , and each fill out the application applying for either term, straight life, 20 payment life, or 20 year endowment policies. The class is to bring in a life insurance agent. He will explain the policies, the purposes of each and the advantages and disadvantages of each. Then the students can apply

their knowledge, including the other references, in the unit, and in turn apply for and state the purposes for the types of life policies. The kinds of companies will be explained by the agent and each evaluated as to its purpose so the students can decide which they prefer.

2. Divide the class in three parts, assigning to the various parts, (1) property insurance (2) personal insurance (3) liability insurance. Each group discusses the type of insurance assigned them,writing questions they would like answered by either the instructor or a professional casualty insurance agent. (Ref.)

   From each of the groups a discussion leader would help pick a casualty agent from the speaker bureau. From the reading reference and from information secured from the speaker, each student can give to the instructor in writing two purposes for casualty insurance and two types of policies.

3. Three students are chosen by the instructor to prepare and do an activity on health insurance identical to Activity 2 which is on Casualty Insurance.

UNIT XX

PHYSICAL DISTRIBUTION - TRANSPORTATION AND WAREHOUSING

Part 1 Transportation

2 Warehousing

UNIT XX - TRANSPORTATION AND WAREHOUSING
Part 1 - Transportation

Length: Open

Prerequisite: A general understanding of where the transportation function fits into distribution of goods and services.

Description: An overview of all the basic modes and classes of carriers.

Objectives: At the completion of this lesson the student will be able to do the following:

1. Given a list of items, select those items that best lend themselves to shipment by air freight, trucks, etc.
2. Compare and contrast the services of the three classes of carriers.

Sources:
Materials Handling, Tyler and Corenthal, 1970, page 121-199.
Marketing and Distribution, Mason-Rath, 1968, page 320-332.
Physical Distribution, Walsh, 1969.

OUTLINE

I. Carriers
    A. Common carrier
    B. Contract carrier
    C. Private carrier
II. Modes of Transportation
    A. Rails
    B. Trucks
    C. Water Transportation
III   1. Ships
        2. Barges
    D. Air
    E. Pipeline
III. Combined Transportation Services
    A. Piggyback
    B. Fishyback
    C. Birdyback
    D. Containerization
    E. Freight Forwarders
    G. REA
    H. Postal Services
IV. Transportation Forms
V. Packaging for Shipping

ACTIVITIES

1. Select a product to be transported across the country. Compare the cost of shipping it by the different modes. Also compare speed.
2. Field trips, reports.
3. Interview training station,etc.

UNIT XX - TRANSPORTATION AND WAREHOUSING
Part 2 - Warehousing

Length: Open

Prerequisite: A general understanding of where the warehousing functions apply in the distribution of goods and services.

Description: An overview of the organization and functions of warehousing.

Objectives: At the completion of this lesson the student will be able to do the following:

1. Given several items, show in which type of warehouse the items would most likely be handled.
2. Given an item, trace it's path through a warehouse. Go from receiving through shipping.

Sources: Materials Handling, Tyler and Corenthal, 1970, page 237-271.
Wholesaling, Ertel, 1970.

OUTLINE

- I. Public warehouse
  - A. General Merchandise
  - B. Special Commodity
  - C. Cold Storage
- II. Private
  - A. Individually Operated
  - B. Cooperative
- III. Warehousing Functions
  - A. Receiving
  - B. Storing
  - C. Processing
  - D. Shipping
- IV. Warehouse Management
  - A. Equipment
  - B. Layout

ACTIVITIES

1. Tour a local grocery warehouse or distribution center.
2. Do a floor plan and flow chart of a typical warehouse.

UNIT XXI

MARKETING RESEARCH

Part 1 Marketing Research in Distribution
2 Marketing Decision Making
3 Information Needed in Marketing Research
4 Gathering and Presenting Market Information

UNIT XXI - MARKETING RESEARCH
Part 1 - Marketing Research in Distribution

Length:	Open
Prerequisite:	A class discussion of marketing's function in a free enterprise economy.
Description:	A study of the role of marketing research in distribution.
Objectives:	Upon completion of this lesson, the student will be able to do the following: 1. List the four P's of marketing mix. 2. Define marketing research and its role in distribution.
Sources:	Principles of Marketing, Zober, 1971, page 471-475. Marketing Research, E.E. Harris, 1969. Marketing and Distribution, Mason-Rath, 1968, page 228-238.

OUTLINE

I. Marketing Research in Distribution
  A. Marketing Mix
    1. Price
    2. Place
    3. Product
    4. Promotion
  B. Role in Distribution
    1. Market
  C. Research
    1. Gathering, recording, and analyzing problems relating to sale of goods and services.

ACTIVITIES

1. Class discussion of the marketing mix and research in Distribution.

2. Why do marketing research? Class discussion.

UNIT XXI - MARKETING RESEARCH
Part 2 - Marketing Decision Making

Length: Open

Prerequisite: Unit 1 Marketing Research.

Description: A study of the decision making process in marketing.

Objectives: Upon completion of this lesson, the student will be able to do the following:
1. List the steps in the scientific method of decision making.
2. Apply and demonstrate using the scientific method on a case problem.

Sources: *Marketing Research*, E.E. Harris, Gregg, 1969.
Principles of Marketing, Zober, 1971, page 478.

OUTLINE

I. Marketing Decision Making
   A. Scientific method
      1. Define the problem
      2. Formulate hypothesis
      3. Prediction of future
      4. Testing hypotheses

ACTIVITIES

1. In groups of four or less, apply the scientific method to: one every day problem, one school problem, one school store problem, and one marketing problem.

2. Have students select a problem, school store, training station, etc., and video tape or have student observers watch for the steps in the steps in the decision making process.

UNIT XXI - MARKETING RESEARCH
Part 3 - Information Needed in Marketing Research

Length: Open

Prerequisite: Review of purpose of marketing research by class discussion.

Description: A study of the information needed to satisfy Date requirements of marketing research.

Objectives: Upon completion of this lesson, the student will be able to do the following:

1. List 9 categories of information pertinent to the customer.
2. List 6 items relating to product information.
3. List 4 promotional techniques.
4. Discuss to teacher satisfaction the relationship of price, economy, political, social, legal, cultural, and company goals in marketing research.

Sources: Marketing Research, E.E. Harris, 1969.
Marketing and Distribution, Mason-Rath, 1969, page 238-248.

OUTLINE

I. Information needed in marketing research
    A. Market Information
        1. Who (people)
        2. Number
        3. Where located
        4. Why they buy
        5. What influences buying
        6. Size
        7. Uses
        8. Attitudes of consumers.
    B. Product information
        1. Materials, workmanship, design, etc.
        2. Packaging
        3. Brand
        4. Service
    C. Promotional Techniques
        1. Personal selling
        2. Advertising
        3. Display
        4. Public relations

D. Price
E. Economic factors
F. Political and legal factors
G. Cultural and social factors
H. Objectives and goals of company

ACTIVITIES

1. Class discussion of importance of each area of information.

2. Reports on the bearing any one of these has on marketing.

3. Have student choose two similar items at his training station. One should be a fast seller, one a slow seller. After a customer purchases one, the student will ask and record the reason they purchased the product. Do this for 5 to 10 customers.

4. Students design a package for X product and use color and design to differentiate. Place four packages on a table and ask group which appeals and why.

5. Students conduct a customer survey of school store or a local business using either interview or questionaire or both.

6. Conduct a survey to determine the power of advertising.

7. Class discussion on cultural and social factors affecting marketing.

8. Panel discussion or debate on:
   a. Is the consumer king?
   b. Are consumers exploited?

UNIT XXI - MARKETING RESEARCH
Part 4 - Gathering and Presenting Market Information

Length: Open

Prerequisite: Parts 1, 2, and 3.

Description: A study of sources of marketing research data.

Objectives: Upon completion of this lesson, the student will be able to do the following:
1. Contrast internal and external sources of market information.
2. List 2 internal and 5 external sources of market information.
3. Gather market information through a sampling by interview or questionnaire and present findings in a written report.

Sources: Marketing Research, E.E. Harris, 1969.
Marketing and Distribution, Mason and Rath, 1968.

OUTLINE

I. Gathering Market Information
    A. Training the interviewer
    B. Developing Questionnaire
II. Sources
    A. Internal
        1. Company
            a. Records
            b. Employees
    B. External:
        1. Research companies
        2. Trade journals
        3. U.S. Government
        4. Public
        5. Retailers (test market)
III. Presentation of Findings
    A. Editing, Tabulating, Coding.
    B. Analyzing results
    C. Preparing written report

ACTIVITIES

1. Student choose product in school store or training station and develops market information on that product using 2 internal and 3 external sources.
2. Distributive Education Clubs of America Marketing Project. A practical application of market research leading to local, state, and national competition. Can be done in groups or by the whole class. Available in DECA Handbook.
3. Have teams of students organize and research the possibilities of locating a shopping center in local area. Research the possibilities for stores and then respective roles in the complex. Make models, etc.

UNIT XXII - STUDENT STORE
Part 1 - The Student Store

Often the student store is the responsibility of the Distributive Education class and is assigned to the DECA Club. Organizing and operating the store requires much work and planning. Some of the steps involved are:

I. Physical Plant

   A. Room size
   B. Equipment
   C. Display window
   D. Name
   E. Display material

II. Tax stamp

   A. Obtaining
   B. How used
   C. Paying of sales tax

III. Inventory

   A. School supplies
   B. Workbooks
   C. Pocket books
   D. Food
   E. Promotional items

IV. Ordering

   A. Placing orders
   B. Receiving orders
   C. Mark-up and pricing

V. Organization

   A. Work schedules
   B. Responsibilities
   C. Grading

VI. Bookkeeping

   A. Ledgers
   B. Invoice billing
   C. Income distribution
   D. Budgeting
   E. Banking

In the following pages each of the above items will be discussed in detail. The suggested procedures are just that--suggestions. The methods used will depend upon the school, the coordinator, and most important--the student.

PHYSICAL PLANT

Equipment

The equipment needed will depend upon the size and layout of the store. Some of the basic equipment needed:

- Display cases
- Display shelves
- Storage areas
- Cash register
- Cleaning materials
- Price tags and/or signs
- Money bags
- Sales tax lists
- Price lists
- Store display materials
- Store sign

Some of these items will also be used in the regular class program. Additional equipment will be needed if a display area or window is provided. The list of equipment and supplies involving display are given under the section on General equipment and supplies for a D.E. program. Display materials and supplies used for decorating the store can be of a seasonal, holiday, or promotional theme. Responsibilities for decorating are given under the section on organization.

In order to obtain a tax stamp, the store will have to have a name or be associated with the ASB. The coordinator can choose a name, the class can decide, or an all-school contest can be run. A sign should be made, perhaps by the woodshop class, and displayed in front of the store.

TAX STAMP

The store will need to obtain a business license and a tax stamp. In order to receive the wholesale rates, this tax number must be given with each order.

Quarterly sales taxes will have to be paid. You will receive a notice and the necessary forms when they are due. Records must be accurate. All sales are classified as retail sales and are taxable.

INVENTORY

It is recommended that the inventory be kept to basic supplies in small quantities at first. As the year progresses, a better estimate can be made as to what and how much to order.

Basic School Supplies

Notebook paper--regular and narrow line
Typing paper--regular and Ezerase
Carbon paper
Drawing paper
Book covers--with and without school emblem
Pee-Chee
3-ring binders--medium size
Erasers--typing, pencil, art
Pencil--#2, colored sets, engineering, drawing
Rulers--6 and 12 inch, compass
Scissors--2 and/or 3 inch
Steno-pads
Theme binders
Index tabs
Note pads
KO-Rect-O-Tape

Others

Gym clothes
T-shirts with school emblem
School stationary

Workbooks and pocket books

The selling of workbooks, special note books, and pocket books required in specific classes accomplishes two things: Revenue, and educating the students to use the store.

Each spring, or, if starting a new program, as early in the fall as possible, contact all of the teachers. Request that they give you a list of the required workbooks, pocket books, and special note books that the students will need to purchase. Stress to them that by letting you sell them, they will be saved a lot of time and record keeping.

When ordering take into consideration:

1. Can the books be purchased on consignment--this is the best method.
2. What is the enrollment of the classes-teachers sometimes get carried away on the number they want you to order.
3. Are the books required--if not, order less.

In some cases the retail price is given. If not, then place a mark-up on them--20% is common.

Food Items

Before ordering any food item, check on school policy. Often there are restrictions. Some items that could be sold are: Apples, carmel apples, beef jerky, life savers, and cough drops.

Promotional Items

These are items that could be used as fund raisers for DECA. They should be items that are not necessarily carried in stock. Suggestions are:

Christmas candles
Licorice
Pom-poms
School pennants
Football cushions

To obtain lists of promotional items, check with the activities coordinator of the school. Also, check with the administration for regulations in the selling of these items.

Ordering

The first step in ordering is to locate distributors in the area and obtain their catalogs and price lists. You will usually find one distributor that will carry many of the school supplies you wish to stock. Special items such as gym suits, emblems, bookcovers, and notebooks showing the school emblems, will have to be ordered from special distributors outside of your area.

Suggested distributors to contact are:

Gym outfits and T-shirts---Chev-Craft Inc.,5601 Ridge Av., Cincinnati, OHIO
Bookcovers and binders---Colar Co. Inc., 701 Senaca St., Buffalo, NY 14210
School emblems---Lindgren Turner Co., E. 821 3rd Ave., Spokane, WA. 99202

Workbooks, pocket books, and special notebooks are usually ordered from the book distributor or publisher. Request the teachers ordering to give you the name and address of the company.

Ordering should take place in the spring. If you are unable to do so, orders placed the first part of August will usually arrive in time for the oepning of school.Remember to include your tax number with any order placed.

Mark-up and Pricing

Many items you will carry will have a retail price printed on the package or will give a suggested retail price. Others will have to be priced. In determining the mark-up take into consideration:

1. Cost of item
2. Amount purchased
3. Expected turn over
4. Competition
5. Can unsold items be returned to the dealer

ORGANIZATION

Responsibilities

The organizational structure can be done many ways. The method used will depend a great deal on the size of the class, the nature of the students, and the coordinator's philosophy. Suggested methods are:

1. The coordinator does all of the functions required plus the scheduling of the employees.
2. A student manager handles all of the functions including the scheduling of the employees. The students would rotate in this position either weekly, bi-weekly, or monthly.
3. The store is organized as a business with a general manager and department heads for scheduling, purchasing, display, accounting. Rotate positions once a month, have store meetings and report progress to the owners--the DECA Club.

Work Schedules

The store hours will depend upon the school's schedule. The store should be open any time that the students are not in class--before school, activity period, lunches.

The work schedule should be posted weekly. If a timeclock is available, the students can punch in and out. The student works the same shift all week.

Grading

The performance in the store can be used as factor in grading. One method is a point system.

1. Each officer or the manager can receive so many points (0-20) based on how well he performed his duties.
2. Points are given for each shift worked.

   4 points--before school
   2 points--activity period
   1 point--lunches

The graduating scale is based on the premise that the before-school schedule requires: Obtaining cash from school safe, opening the store, replenishing stock: the activity period is 2 points for the student is doing it on his own time; the lunch is worth one point for the class is meeting during the lunch time and the students rotate on the lunch schedule.

If the students do not come in when they are scheduled or call if they are ill, they loose all the points for the week. If they are late, they must work a shift without any points.

At the end of each quarter or semester, the points are totaled and grades are based on the number of points earned.

Some of the daily duties would include:

Opening the store
Replacing stock
Cleaning and dusting shelves
Balancing cash drawer

Weekly duties:

Checking inventory
Making deposits
Ordering
Checking shipments
Work schedules
Totaling points

Monthly duties

Changing decorations
Balancing books
Financial report
Discussions on problems improvements, and sales promotions.

BOOKKEEPING

The bookkeeping functions of the store are very important, not only for tax purpose, but also to control the inventory and the accuracy of the students.

The system used can be as elaborate or simple as necessary. The procedures established will depend mainly on the volume of sales, the size of the inventory and the regulations of the school and the district. Basic information that must be kept:

Cash receipts
Cash disbursements
Inventory
Orders pending
Cash register control

The amount of cash-on-hand will depend upon the store. Most of it should be in the form of change and small bills.

The banking procedures and the budget will depend upon the relationship between the store and the school. The store can be run independently or as a part of the associated student body.

If it is to be run independently, a bank account will have to be opened and methods for handling the banking procedures developed. Very accurate control must be maintained as it will probably be audited by the school district offices.

The most common method is to have the ASB handle the receipts and disbursements. The procedures involved are usually already in operation and the coordinators responsibility will be to obtain the necessary information.

The profit from the store can be distributed several ways. Some of the most common methods are:

1. The ASB receiving all of the profits with DECA being alloted a certain amount in the over-all school budget.

2. DECA receiving all of the profits and excluded from the school budget.

3. A certain percentage of the profits go to both DECA and ASB.

The first method is not recommended. Much time and effort is involved in the organizing and maintaining the store. While it is a learning experience, it is questionable if the value received offsets the effort expanded. The

Coordinators responsibility is to convince the administration of these facts.

The budget that the store operates under will again depend upon the financial structure. The school may require a budget each spring showing the expected revenue and expenses.

Some expenses would be:

Governors Conference
State convention
Scholarships
Employee-Employer banquet
Entertainment
Misc. Expenses

BEST COPY AVAILABLE

Month________________ Beginning total in cash register__________ __________

	Sales					Clerks				Errors		
Date	School Supplies	Paper backs	DECA	Misc. P/O	Total	"A"	"B"	Total	Tax	Over	Short	Deposit
Total												

Financial Mgr

AY	A.M	B	1	2	3
MON					
TUES					
WED					
THUR					
FRI					

EK OF ______________ MANAGER ______________

The Trading Post

ACCOUNTS ______________________________

Purchases:

Date	Amount

Payments:

Date	Amount

CHANGE	CASH REGISTER	OVER	SHORT	CASH TOTAL	CHARGES	PAID OUT	TOTAL SALES	MARKDOWNS

UNIT XXII - STUDENT STORE
Part 2 - The School Store as a Learning Tool

General Goals

To give students the opportunity to put into practice skills and knowledge of retailing learned in their regular D.E. Classes.

To be able to improve these skills to such an extent that it will enable them to be hired as a person "with experience".

NOTE TO INSTRUCTOR

This unit contains job descriptions with behavioral objectives for 5 store offices: General Manager, Bookkeeper, Stockkeeper, Personnel Manager, and Promotions Manager. In addition there are behavioral objectives by subject matter with some source of information and additional activities. Would suggest that some be required and others choices for extra credit.

The step-by-step sections of course will have to be edited to fit your own school situations.

Individual Project
Time allowed - 1 Semester
Competencies -- Marketing
Social Economics
and Basic Skills
Level of learning - To Management

Title: General Manager of ________________ (School Store)

Prerequisite: Completed instruction in Jr. Preparatory D.E.

Concurrant with this project--to complete a class project on seasonal coding.

Go over with teacher correct procedure in checking out a cash register.

Description: You will be in charge of conducting business necessary for the successful operation of the school store. You will be responsible for all operation but will delegate to other sub-managers. This job will be for at least one semester.

Objectives: At the end of this unit you will be able to:

1. Assume responsibility of placing orders and re-ordering so the store is never out of needed items; buying what customer wants within store policies. (Sample of policies attached).
2. Run the store without conflict with fellow staff members.
3. Readily find any and all information necessary to good store operation due to well kept files and records.
4. Check out cash register
5. Courteously deal with salesmen
6. Price merchandise so profit will be shown.
7. Delegate authority for smooth running organization.
8. Conduct store meetings that are meaningful
9. Seasonal Code all incoming merchandise.

Materials and Equipment:

1. Cash register check out forms
2. Cash register tapes
3. Cash bag
5. File
6. Want forms
7. Overring Forms

(Sample of forms attached) probably better to make up your own to suit your own situation.

Step by Step

1. Become acquainted with store records (stock records and financial records)
2. Check on all incoming orders so you will know what to look for.
3. Work out a system of recording customer requests.
4. Work out a seasonal code system (should be different from last years)
5. Call staff meetings to:
    a. go over duties
    b. arrange for store opening
    c. go over store policies - (Sample set of policies enclosed)
    d. answer any questions
6. Be sure all items are correctly priced (delegate)
7. Make arrangements for first days cash bag.
8. Place all orders as needed after consultation with stock manager.
9. Check out cash register at end of each day.
10. File cash register reports and keep record of errors.
11. Deposit cash. Get receipt and give to your bookkeeper.
12. In case of your absence the bookkeeper will check out register. It will be your responsibility to train her/him as to proper procedure. Suggest all staff members be checked out on procedure.

EVALUATION

Student: Write up report according to following questions. Keep one copy for your project file and give one to the teacher.

1. To your knowledge, were sales lost due to running out of stock? Explain.
2. Is the stock too heavy? Too light? What would you suggest be done?
3. What was the average per cent of markup?
4. Did you have any problems with personnel? Personality conflicts, evidence of dishonesty or inefficiency?
5. In which ways did you delegate authority?
6. Do you feel this was a worthwhile project for you? In what ways?

Teacher Evaluation Guide:

Did the store maintain a profit during this period?

Were reports complete--accurate and on time?

Were you aware of strife between staff members and/or salesforce?

What was the general appearance of the store?

POLICIES OF THE BENGAL SHOP

Personnel

1. It shall be the policy of the Bengal Shop to staff the store from the Distributive Education classes so that they might gain experience and skills in retailing that will help them obtain jobs in the business community.
2. High standards of salesmanship will be stressed at all times.
3. In liew of monetary pay, grades will be earned for each two week's shift. Two such shifts for a total of four weeks will be required (depends upon enrollment).
4. At least three salespeople will be on duty each shift. This serves a triple purpose: (a) help each other see problems arise, (b) watch for shoplifting and, (c) keep each other honest.
5. The store officers shall consist of General Manager, Stock Manager, Bookkeeper, Personnel Manager, and Promotions Manager. Office shall be held for one semester.

Promotion:

1. There will be at least one major promotion per year to keep the Bengal Shop alive in the minds of the students.
2. Ad space will be purchased in the school paper at regular intervals.

Customer:

1. No personal checks will be cashed.
2. No change will be made except for merchandise purchased.
3. Loitering in the store will not be tolerated.
4. Courtesy will be extended to every customer.
5. No credit will be extended.

General:

1. Store hours: The Bengal Shop will be open 1/2 hour before school and during lunches.
2. The Bengal Shop will comply with all general school regulations.

POLICIES OF THE BENGAL SHOP

Merchandise:

1. It shall be the policy of the Bengal Shop to carry merchandise limited to the needs of students for their high school classes.

2. Merchandise will be further limited to three categories:
   Stationary, paperback books, and good grooming aids and food items as approved by school authorities.

3. To be aware of the needs of students a "want" book will be kept on all merchandise asked for. At the discretion of the store officers new merchandise can be ordered.

4. Complete stock records will be kept for such information as turnover, resources, running daily income and expenses, etc. (see bookkeeper duties)

5. It shall be the policy to keep inventory at its lowest possible dollar value consistent with good business.

6. All merchandise will be sold at prices in line with surrounding businesses. The store should not be considered as competition but as a laboratory of learning.

7. Whenever necessary sales boosters will be added to keep sales even.

Individual Project
Time Allowed-One Semester
Competencies-Economic
Social
Basic Skill

Title: Personnel Manager for School Store

Prerequisite: Completed the course in Jr. Preparatory D.E.

Description: The Personnel Manager will assume the responsibility of staffing the school store with a sales force, be responsible for their duties - assist the coordinator in seeing they are carried out. This job to last for a period of one semester.

Objectives: At the end of this project the student will be able to do:

1. Assume responsibility for staffing the school store.
2. Delegate authority without being "bossy".
3. Make up job break downs.
4. List the duties of a personnel manager.
5. Keep a clean store.

Materials and Equipment:

Poster Paper Felt Pens

Step by Step:

1. Obtain a list of Junior D.E. Students.

2. Design a questionaire to find out the following information: (from Juniors)
   a. Availability for one of the 4 shifts of school store. (buses might affect availability)
   b. Class schedule
   c. Previous experience with cash register.
   d. Extra curricular activities.

3. Develop a work schedule for the first week of school using those Juniors who have had previous experience with the cash register whenever possible.

4. Personally notify each one on schedule (notes will do)

5. Make work schedule for rest of month. From here on all work schedules should be posted one month in advance on store bulletin board and class room bulletin board. Be sure every Junior is scheduled for one 5 day period per semester. (the number of times juniors serve as sales prople will depend on number in class)

7. Set up system for checking on efficiency of your sales (see evaluation form)

8. Check attendance daily to see if you have to call in a substitute.

9. Plan to be at school by school store opening to check coverage--you need not stay. If you wish you may require your staff to call you at home if they will not be in attendance that day. You will then call someone else to take their place or do so yourself.

10. Attend all meetings of store staff when called by store manager.

Evaluation

Student:

1. How would you rate your own ability to assume responsibility.

	Perfect	Missed	2 Times	7 Times
Were schedules posted?				
Checked daily attendance				
Posted Job Breakdown				
Notices sent out at change of shift				

Rate yourself excellent-good-fair or poor according to the above chart.

2. Were you able to solve personality difficulties? How did you do it?

3. Did you have any problems staffing the store - what were they ? How did you overcome them?

4. Store efficiency rating:

	excellent	good	fair	poor
Sufficiently staffed				
Customers controlled				
Glass clean				
Stock neat				
Front stock kept up				
Business like attitude of staff				
Register errors				

Hand in a copy of this evaluation to teacher. Keep one for your project file.

Teacher

Teacher and student evaluation would follow the same pattern. This area will take a great deal of observation on the part of the teacher. Also frequent conferences.

BENGAL WORK SCHEDULE QUESTIONAIRE

Sample form to be used by Personnel Manager

1. Name____

2. What lunch do you have?______________________

3. Are you available for morning shift, if not, why not?

4. What experience have you had with a cash register?

5. Starting with your roll room, list your classes, teachers, and room numbers.

   Roll Room
   1st period
   2nd period
   3rd period
   4th period
   5th period
   6th period

Individual Project
Time Allowed - One Semester
Competencies - Marketing
Technological
Economic
Social
Basic Skill
Level of learning - To Operational

Title: Stock Manager for School Store

Description: You will have complete charge of the stock-control records for the school store for a period of one semester. You are to work with with the general manager and give him/her information necessary to place orders. It will be your responsibility to see that the store never runs out of the essential merchandise.

Objectives: At the end of this project the student will be able to:

1. Define "stock care"
2. List 4 reasons good stockkeeping is important.
3. What is meant by reserve stock? Understock?
4. Describe what is meant by "proper" storage of reserve stock.
5. Demonstrate proper storage of reserve stock by keeping it in order at all times.
6. Describe 4 ways you can keep stock fresh in the school store.
7. Define basic stock. What do you consider basic stock for the store?

Materials-Reference-Equipment:

Stock control books with supply of forms.
Price tags and stickers.
Carton Openers

Step-by-Step:

1. Become acquainted with stock records as already set up.

2. Check on all orders placed to know what to watch for. Be sure they are entered in your stock records.

3. Unpack all incoming merchandise.

4. Enter merchandise received in Control Books. Be sure you get all information. If new merchandise, a new page must be started. (Check evaluation chart)

5. Check against packing slip.

6. Route packing slip to bookkeeper who will match it to invoice. In some cases the packing slip will be the invoice.

7. See that all merchandise is correctly marked. If it is new merchandise and not pre-marked, set aside until you can confer with store manager or coordinator as to price to charge.

8. Before back-stocking shipment be sure front stock is up.

9. Stock merchandise so that it can be easily seen and counted. Have like things together.

10. Whenever possible remove by units of packaging when stocking front of store. This makes for easier inventories. (Example: Always take full box of pens or pencils not just a few).

11. Remove all empty cartons, wrapping paper, etc., as soon as possible. It is your responsibility to keep receiving area free from clutter.

12. Attend all meetings of staff.

Evaluation

Student:

1. Were your records kept up-to-date?

2. Could they be read easily by others?

3. Information that should be available from your records:

	Availability		
	All of time	Most of time	Seldom
How many items have been sold			
How many items have been ordered			
How many items on hand			
What merchandise is moving			
What is the turnover			
Where do we get the items			
How long did it take to arrive			
What is the minimum packaging			

Teachers Evaluation

Spot check books at least once a week for the first month. Confer with student. Was student able to work with others.

Evaluation of stockroom - to be done with student

Check points.	YES	NO	REMARKS
1. Logical arrangement			
2. Stocked neatly			
3. Can labels be read			
4. Sufficient but not too much back stock			
5. Free from dust			
6. Doors kept locked			
Evaluation of stock Records			
1. Can find all information at any time			
2. Records are legible and neat			
3. Supplies available (forms, etc.)			

Extra Activity

Work in groups of two or five. Make up your own stock record book:

(a) Information necessary on all stock pages.

(b) Classify stock in Bengal Shop.

(c) Alphabetize each classification

(d) Tabulate stock book

(e) Revise stock pages if you deem necessary

Each group will keep and compile results of their work even though it is not used in actual stock record. This work is to be turned in at the end of the Mini-Quarter for proof of work done. Your inventory record orders, and receiving should all show on your stock record.

How the information is used from stock records:

1. Sales by units
2. Sales by dollars
3. Turnover (see project on Merch. Math)
4. Slow moving stock (mark) (by red?) when in this danger zone.
   What can be done about slow moving stock?

   1. Send it back
   2. Conduct sale at reduced prices
   3. Merchandise it out.

Each group should pick out one slow moving item and determine what to do in order to realize own investment.
Do an inventory on this item before and after. Determine how long you will allow before checking results. If no results, try another method.

Individual Project
Time Allowed - One Semester
Competencies - Technological
Economic
Basic Skill
Kind of Learning - Operational

Title: Bookkeeper for School Store

Prerequisite: Completion of course in Junior Preparatory D.E.

Course in bookkeeping helpful but not required.
(or Treasurer of a club)

Description: You will assume complete change of the books of the school store, keeping accurate and up-to-date records of all financial transactions for a period of one semester.

Objectives: At the end of this Project ths student will be able to do:

1. Become acquainted and skillful with an acceptable bookkeeping system.
2. To be able to translate information to others on the staff as needed.
3. To be able to assume responsibility of keeping financial records of the school store.

Material and Equipment

Past financial records
Record forms

Step by Step

1. Look over past records-ask questions if you do not understand.
   Do not take records from school.

2. Set up forms for your own books. (You may make up your own, order standard forms or continue with existing methods)
   Information needed:
   a. Resources - with addresses, invoice number, date, amount and date paid.
   b. Monthly record of expenditures, date, resource, and amount.
   c. Daily running account of movies received.

3. Check with school bookkeeper to find out beginning cash on hand, or any outstanding bills.

4. Order any supplies you might need for your office.

5. Plan your day--what time in the day will you be able to set aside for bookkeeping? Your job is important;this responsibility must be assumed.

6. Check for invoices daily--check for accuracy, enter in your books--initial and present to school bookkeeper for payment.

7. Double check with stock manager to see if merchandise has been entered in his/her books.

8. Get daily deposit slips from general manager and enter into your running account of income.

9. Prepare a monthly financial report according to accepted form.

10. At the end of the semester prepare a financial re-cap containing:
    numbers of resources--amount from each:
    total sales
    total expenditures
    total profit or loss
    total invoice on hand--by cost, by retail (work with manager of stock)

11. Make periodical checks with school bookkeeper to see if your books balance. (Ask for an appointment at her convience) Suggested number of appointments--3.

Evaluation

Student: Write up a report for your project file - (one copy to teacher) answering following questions:

1. Have you been able to supply necessary information from your records when asked, without delay?

2. Are you records easily read by yourself as well as others?

3. Do your books balance? If not how much in error? Can you explain?

4. Do you know more about bookkeeping as a result of this project?

Teacher:

The records can and should be your only check. Check them frequently first part of semester--less frequent at the end of the semester.

Individual Project
Time Allowed -- One Semester
Compentencies -- Technological
Social
Basic Skill
Level of learning to Management

Title: Promotion Manager of the School Store.

Prerequisite: Must have completed Junior Preparatory D.E.

You should do concurrently with this project and as early as possible individual projects on sign writing and ad promotions.

Description: You will endeavor to increase sales in the school store by means of well planned and placed promotions, events, ads, and signs. Although a promotions manager of most business has working for him artists and ad men, you will be all of them. This job is to run for one semester.

Objectives: At the end of this project the student will be able to:

1. Make up a calendar of events for each semester. Present at store staff meeting for approval.
2. Plan, execute, and analyze results of each promotion.
3. Write up at least one ad to be placed in the school paper. Be careful of wording and grammar. Keep a copy in your file. All ads must be in one week in advance of publication.
4. Keep a record of sales for each planned event.
    a. number of units sold of "ad" items.
    b. total sales for the day
    c. was there a substantial increase over previous week?
5. Make necessary signs and posters for each event. There should be at least one. Be sure it:
    a. Catches the eye
    b. is spelled correctly
    c. is professional in appearance
    d. induces action
6. Be responsible for at least two displays using merchandise sold in school store. Plan a display calendar. Do not pass up your turn. When finished, turn in diagram and/or description (with date) for grading.

Reference Material and Equipment

Reference books on Ad and Sign writing   T-square

Poster board-paint (show card) - brushes lettering pens   Lettering sets

Ad forms   Drawing table
P.A. Announcement forms

Step by Step

1. Become familiar with store policies.

2. Make up a calendar of events for the semester. Present at a staff meeting for approval.

3. Plans for each event in detail will also have to be reviewed by the staff.

4. All ads for school paper must be in one week in advance of publication.

5. Acquaint yourself with materials and supplies on hand that you will need for your office. Order anything else you will need through the stock manager.

6. Set up a work area in back of store.

7. For P.A. announcements use the form provided by the school office. Be careful of wording and gramatical errors. Keep a copy in your project file.

8. Acquaint teachers with any new items or books of particular interest to their field. Use form provided.

9. For each promotional event keep a record of sales:

   a. number units sold of ad items
   b. total sales for the day
   c. was there a substantial increase?

10. Make all signs and posters (you may use any student Senior or Junior, who has completed a project on sign lettery).

11. Attend all staff meetings.

Evaluation:

Student:

1. How many and what kinds of sales events were planned? Were there enough? too many? What cost was involved? (Attach copies of all news ads and P.A. announcements to this report).

2. What proof do you have that these events were successful?

3. Were you able to work in harmony with your staff? Did you use any assistance in making signs?

4. In what way do you think you have developed skills? Sign lettering--Creativeness--planning.

5. Do you feel this project was valuable to you? What phase was the greatest interest?

Teacher Evaluation

Confer with student when he is making the evaluation.

Did the student assume responsibility in carrying out semester plans?

Were sales increased due to this project?

Did the student complete the two additional projects suggested?

UNIT XXII - STUDENT STORE

Part 2 - The School Store

Behavioral Objectives and additional activities by subject headings to be used as individual or group activities at teachers discretion. Sources of information are often cross referenced to main course of study.

Objectives:

Salesmanship: At the end of this project the student will be able to:

1. Describe how you can make a suggestive sale in the school store.
2. Name 3 ways you can increase the sales for the day.
3. Describe a "want book" and explain its purpose. (or word slips)
4. Make a list of all non-selling duties of the salesperson in the school store.
5. Describe what you would do if a customer causes trouble by
   (a) Loitering
   (b) Boistrous
   (c) Complains about the merchandise
6. Explain how you would handle a refund.
7. What 3 people must sign a refund.

Activity:

Conduct a survey of downtown businesses as to how they keep abreast of customer requests. Work in groups of 3 to 6. Choose a variety of stores. Some may not give good results, so be sure to have at least ten stores to survey. Find out the method used to record requests and what is done about these requests. How important are WANT SLIPS to the buyer or retailer?

Allow at least 15 minutes per interview plus 20 minutes commuting time. Several stores can be done a day. Call for an appointment or have the teacher call.

This activity could be an outgrowth of a store meeting.

Project: School Store

DAILY BALANCE SLIP

SHIFT__________ DATE__________

CASH IN REGISTER	CASH COUNT		DEPOSIT	CASH BAG		
Denominations:	$	¢		$	¢	CHECK
Pennies						
Nickels						
Dimes						
Quarters						
Halves						
Currency						
Checks						
Total Cash in Register						
Less Beginning Cash						
Net Cash in Register						
Total Deposit						
Total Cash Bag						

REGISTER READING

	$	¢
Today's Reading		
Less Overring		
Net Register Sale		

Over________

Under________

O.K.________

Net Reg. Sales and Net Cash in Bag should be the same.

Signature____________

Project:

VOID SALES AND CORRECTION VOUCHER

YOUR NAME____

APPROVED BY______________________________________

REASON FOR VOID___________________________________

____

____

AMOUNT TO BE VOIDED $_____________________________

VOID TRANSACTION NO._____________________________

CORRECT AMOUNT OF SALE___________________________

CORRECT TRANSACTION NO.__________________________

DATE OF VOID_____________________________________

NOTICE: Use this form in EVERY case where it is necessary to void cash register ring. Attach voided saleslip or cash register receipt to this form and place in cash register.

PROJECT: Designed for CUP COUNT control as done by Connes Theaters.

CONSESSION STAND

SHIFT__________

DA[illegible]__________

CASH IN REGISTER	CASH	COUNT
	$	¢
Denominations:		
Pennies		
Nickels		
Dimes		
Quarters		
Halves		
Currency		
Checks		
Total Cash in Register		
Less Beginning Cash		
Net Cash in Register		

SALES EXPECTED CUP COUNT

SIZE	9oz.	7½oz.	12oz.
BEG. CNT.			
END. CNT.			
TOTAL SALES			
X.........	X15	X15	X25
CASH SALES:			

TOTAL EXPECTED SALES:__________

ACTUAL SALES:__________

OVER:__________

UNDER:__________

O.K.:__________

SIGNATURE:__________

____

____

Cold Drink Machine Only

BEHAVIORAL OBJECTIVES

Care of Money

1. To be able to place money in the till in the correct manner
2. To check in cash bag
3. To make up a cash bag for a specific amount each day
4. To make out a deposit slip each day
5. To take care of the deposit

Source: Refer to Cash Register Operations Unit.

Counting Change

1. To demonstrate the correct method of counting change
2. To be able to demonstrate how to take care of an "over-ring"
3. To explain the principle of why"over-rings" should be taken care of the proper way.

Source: "Making Change" - National Cash Register
Refer to Unit on Cash Register Operations, Part 3.

Operating a Cash Register

1. To be able to list comparative prices of cash registers
2. To demonstrate the correct method of replacing tapes
3. To demonstrate how to "read" a cash register anytime during the day.
4. To demonstrate how to "close out" a cash register
5. To demonstrate how to add up a customer's purchases on the cash register.
6. To demonstrate how to set the date line on the cash register.
7. List 7 things a cash register can do.

Source: Refer to Unit on Cash Register Operation, Part 1.

Store Security

1. List 6 things to watch for in spotting potential shoplifters.
2. Describe how you would handle the customer who insists he has given a $10 bill instead of a $5 bill.
3. Name at least 2 ways of identifying counterfeit money.
4. What would you do about defaced money?
5. List 8 ways a store can cut down on shoplifting.
6. Name at least 4 ways to cut shoplifting in the school store.
7. Describe your state and/or city anti-shoplifting law.
8. Define what is meant by "shrinkage".
9. Explain why a systematic stock control helps to cut down shrinkage.

Source: Refer to unit on Shoplifting.

ACTIVITY

Security:

Read at least two articles on shoplifting, or store security--Use school and city library. Suggested reading is:

Magazines: Stores Store Management

Progressive Grocer

You have a choice of working on this project individually or in a group. Limit the group to three.

Interview at least two businessmen on the subject of store security. Be sure to cover both aspects of external and internal theft.

Discuss among yourselves and come up with a workable plan for the Bengal Shop. Put it into operation.

Inventories

1. Be able to list all information necessary on an inventory slip.
2. Name four inventory systems.
3. Be able to plan and conduct one complete inventory of the school store.
4. Enter and extend inventory in school stock record book.
5. Define: Stock Turn, Net Sales, and Average Stock.
6. Be able to figure turn over problems from any given page of the stock book.
7. Explain how inventories can be taken while store is still open for business.
8. In taking a physical inventory, list at least 4 ways to cut down on errors.

Source: "Learning How to Inventory",Small Business Management #2, page 25-48.

Bookkeeping (To be completed by all staff members)

1. Following is a list of information often needed in running the school store. From which of the sources given would you find this information? Fill in A, B, C, or D (can use more than one).

A. Stock Book
B. Bookkeeper's Ledger
C. Daily Balance Slips
D. Files of all Transactions

_____Merchandise loss (due to theft or damage)
_____Inventory to date
_____Date of invoice
_____Receipt number
_____Invoice number
_____Total sales to date
_____Daily sales
_____Record of payments
_____Amount purchased from a specific resource
_____Total Debits
_____Retail price (by unit)
_____Wholesale cost (by unit)
_____Minimum order
_____Turnover
_____Profit and/or loss
_____ Who worked and when
_____Cash register error (over/under)
_____Merchandise on order
_____Amount merchandise received
_____Date merchandise was received
_____Resource
_____Sales per month
_____Record of returns
_____Over-rings
_____Specific merchandise ordered
_____Address or phone number
_____Communications
_____Terms
_____% of Profit
_____Slow moving stock

2. List all the information that can be found on an invoice. (9)
3. Differentiate between an invoice and a packing slip.
4. Define a resource
5. Be able to figure problems of terms on invoice
   (problems to be worked out)
6. Define: E.O.M. F.O.B. 2/10 Net 30 R.O.G. 60 Extra
7. Demonstrate ability to keep neat and accurate records. These records to be subject to audit at any time.
8. What 3 things can be done about slow moving stock?

Resources

1. Define resource
2. Make a list of all the resources with addresses used by the school store and name the type of merchandise purchased from each.
3. Define the following:
   - a. Central market
   - b. Wholesaler
   - c. Buying office
   - d. Vendor
   - e. Market representative
   - f. Jobber
   - g. Middleman
   - h. Manufacturers' agent
   - i. Market scout
4. Classify the resources used by the school store using the above list.
5. What terms, if any, are given by each resource?

Source:
Retailing, Richert, page 418-421.
Merchandising Workbook, page 95-103.
See Type of Distributive Business Unit
See Merchandise Math Unit
Small Business Management #2, page 15-20

ACTIVITY

Make a field trip to at least one supplier - more if possible.

INVENTORIES

For this project you should read some good texts on the subject. Use the school and city libraries as well as classroom references.

Suggested reading: Retail Merchandise - Wingate & Samson, page 459-463.
Retailing - Richert, page 137-140.

1. If possible, plan to devote one full day observing or helping to take an inventory in a downtown store. Arrangements to be made by the teacher.
2. By working in groups of not more than four, plan and carry out at least one inventory for the Bengal Shop. Enter the results in your stock book or the regular stock book for the store (see project on stock).
   Criticize your inventory as to:

   1. Efficiency (time) 2. Accuracy 3. Method

Teacher will spot check each inventory.

Remember you will have the problem of taking inventory while the store is open for business. Write a short paper on the results of your observations and reading.

Store Policies

(Reviewed each year---not necessarily changed)

1. Define "policies"

2. Be able to write down the store policies for each of the following areas:

    1. Merchandise
    2. Pricing
    3. Personnel
    4. Customer
    5. Hours
    6. Promotion

3. Demonstrate your knowledge of the store's policies by conforming to them at all times you are working.

BENGAL SHOP PROJECTS

MINI-QUARTER

SUBJECT---MERCHANDISE MATH

READING

RETAILING--Richert

Pages 423-426

438-445

RETAIL MERCHANDISING--Wingate

Pages 246-252

243-244

488-497

COMPLETE THE ATTACHED PROBLEMS

TURNOVER

Formula:

$$\text{Stock Turn} = \frac{\text{Net Sales}}{\text{Ave. Stock}}$$

Net Sales--Total Sales in units or $ for desired period (6 mo. or 12 mo.)

Ave. Stock--Number units on hand and total units received divide number of months in desired period

PROBLEMS

Compute Turnover to nearest tenth

1. Net Sales $48,550; Ave. inventory $14,200. = ______________________________
2. Net Sales $129,500; Ave. inventory $21,900. = ______________________________
3. Net Sales $1,962; Ave. inventory $564. = ______________________________
4. Unit Sales 150, Ave. Stock is 6 = ______________________________

5. Net Sales $125,000; Ave. Inventory $10,000. = ______________________________

6. Purchases were $40,000; beginning inventory was $5,000
Closing inventory was $9,000; Ave. stock was $4,000 = _______________turns

7. Typing paper packet at 29c. Total sales were 162 units since Sept. 6.
Number on hand Sept. 6 was 13, received since Sept. 6, 168.______________

8. Dixon pencil at 5c, sold 318 units from Sept. to Dec. 18. Number on hand
were 32, number ordered was 4 gross, inventory as of Jan. 4 was 33. What
was the turnover?____

9. Bengal Shop Net sales from Sept. 6 to Dec. 18 $1,940.; Ave. inventory
$1,022.____

10. Compute the turnover for 10 items carried in the Bengal Shop.

BUYING TERMS

2/10 Net 30

2/10 Net 30 is a cash discount which means that 2% of the amount of the invoice can be deducted from the total if that invoice is paid within 10 days of invoice date. If invoice is not paid within the 10-day limit, the full or net amount must be paid within 30 days of invoice date. Sometimes more than 2% terms are given. A buyer always tries to get the best terms possible.

R. O. G.

This and the following notations concerning time allowances are usually following the 2/10 notation. 2/10 R.O.G. means that a discount of 2% will be allowed if the invoice is paid within 10 days after receipt of goods regardless of invoice date.

E.O.M.

2/10 E.O.M. means that a 2% discount will be allowed if the invoice is paid within 10 days after the end of the month in which the goods were invoiced, regardless of when the goods were delivered.

60 Extra

2/10 60 Extra means that 60 additional days are allowed in the discount period, or actually 70 days are allowed for the 2% discount from the date of invoice.

As of Jan. 1

2/10 as of January 1 indicates that regardless of the date of invoice, January 1 following the date of invoice is the date for figuring the discount period. That is January 11 would be the day on or before which the invoice must be paid if a 2% discount is taken. The purpose of this is to encourage merchants to accept merchandise before seasonal demand.

Work the following problems, giving the date and amount due in each instance. Make your answers to the nearest cent.

Date of Invoice	Terms	Amount of Invoice	Date Due	Amount Due
January 7	3/10 60 Extra	$ 90.00		
February 18	2/10 E.O.M.	87.50		
March 2 Rec. April 10	5/10 R.O.G.	657.80		
March 20	6/10 30 Extra	432.50		
April 1	2/10 as of July 1	49.75		
May 1	5/10 E.O.M.	532.16		
June 19	4/10 as of Jan. 1	27.93		
July 3 Rec. July 21	2/10 R.O.G.	1587.61		
July 13	3/10 90 Extra	37.95		
August 25	2/10 as of Dec. 1	4583.15		
September 3 Rec. Sept. 20	4/10 R.O.G.	92.40		
September 14 Rec. Oct. 3	2/10 R.O.G.	78.50		
October 12	5/10 60 Extra	63.75		
November 11	3/10 as of Feb. 15	99.95		
November 28*	5/10 E.O.M.	737.55		
December 2[illegible]*	2/10 E.O.M.	123.45		

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*In these examples, invoices dated after 25th of month are treated as next month's

INVOICE TERMS

Read Text Before Doing These Problems

A. How the Cash Discount and the Amount Paid on an Invoice Are Determined. Find the Cash Discount and the Net Amount of the following Invoices:

No.	Gross Amount of Invoice	Terms	Cash Discount	Net Amount of Invoice
1	$2,400.00	5/10, n/30	$120.00	$2,280.00
2	5,600.00	2/10, n/30	....	....
3	7,500.00	10/10, n/30	....	....
4	984.00	6/10, n/30	....	....
5	865.00	8/10. n/30	....	....
6	3,240.00	3/10, n/30	....	....
7	540.50	4/10, n/60	....	....
8	750.75	5/10, n/60	....	....
9	4,280.65	7/10, n/90	....	....
10	8,950.00	4/10, n/90	....	....

B. How the Cash Discount and the Amount Paid on an Invoice Are Determined. Find the

No.	Gross Amount	Terms	Date of Invoice	Date Paid	Cash Discount	Net Amount
1	$7,600.00	5/10, 3/30, n/60	Mar. 16	Apr. 12	$228.00	$7,372.00
2	4,800.00	5/10, 2/30, n/60	Aug. 16	Sept. 1[illegible]	....	....
3	5,275.00	4/10, 1/30, n/60	Apr. 13	Apr. 16	....	....
4	6,400.00	10/10, 5/30, n/60	Dec. 15	Jan. 8	....	....
5	5,875.00	8/10, 4/30, n/60	Oct. 27	Nov. 17	....	....
6	864.50	6/10, 3/30, n/60	Jan. 16	Feb. 10	....	....
7	725.30	2/10, 1/30, n/60	May 20	June 7	....	....
8.	4,658.75	5/30, 1/60, n/90	July 17	July 23	....	....
9	3,005.25	8/10, 5/30, n/90	Sept. 22	Oct. 1	....	....
10	535.60	10/10, 3/30. n/90	Nov. 16	Dec. 15	....	....

C. Cash Discount Applied to Practical Business Problems.

1. Find the amount paid for the following invoice of merchandise bought from the George Rose Grocery Company on August 25, terms 5/10, 2.30, n/30, if paid September 5.

3 1/4	doz. Cans Salmon	@ $4.98	=	$............
6	doz. Cans Tomato Juice	@ 1.37 1/2	=	....
3 1/2	doz. Cans Soup	@ .87 1/2	=	....
36	lbs. Soap Flakes	@ .19 1/2	=	....
6 1/4	doz. Lemons	@ .42	=	....

Net Price.................................. $..........

Cash Discount (........%).................... ....

Net Cash Price............................ $..........

Compute amount to be paid if purchaser takes advantage of terms on these invoices on the following page

BEST COPY AVAILABLE

[illegible]

5509 RIDGE AVE. CINCINNATI, OHIO 45213

INVOICE No. 97332

CUSTOM DESIGNED [illegible]WEAR

INVOICE DATE - [illegible]-5-69

SOLD TO

STADIUM HIGH SCHOOL
[illegible]
111 NORTH E. STREET
TACOMA, WASHINGTON 98406

SHIP TO

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
10-[illegible]-69	COUNTY [illegible]	[illegible]	[illegible]	BEST WAY	[illegible]

Terms: [illegible] 10 Days [illegible] FACTORY

STYLE NO. AND DESCRIPTION									Total Dozens	Price Per Dozen	Extension
22300 [illegible] NAVY [illegible]	B	6/	12/	12/	6/				3	23.50	70.50

NOTICE: [illegible]

XXII-2-47

BEST COPY AVAILABLE

5601 RIDGE AVE. CINCINNATI, OHIO 45213

INVOICE No. 97631

CUSTOM DESIGNED SPORTSWEAR

INVOICE DATE - 8-5-69
DATE 9-15-69

SOLD TO
STADIUM HIGH SCHOOL
ATTN. PHYSICAL EDUC.
111 NORTH E STREET
TACOMA, WASHINGTON 98406

SHIP TO

10-2 [illegible]	CONTY [illegible]		[illegible]					[illegible]			[illegible]	[illegible]	[illegible]
Terms 2% 10 Days Net 30	F.O.B. FACTORY	A	2	4	6	8	10	12	14				
		B	8	10	12	14	16	18	20				
STYLE NO. AND DESCRIPTION		C	24	26	28	30	32	34	36	Total Dozens	Price Per Dozen	Extensions	
		D	SMALL	MED.	LARGE	X-LG.							
		E											
#35 GIRLS WHITE		B	6/	12/	12/	6/				3	27.50	82.50	

[illegible]

NOTICE: [illegible]

BEST COPY AVAILABLE

CONSOLIDATED
PRODUCTIONS
INCORPORATED

DUPLICATE INVOICE

[illegible]
[illegible]

SOLD TO
[illegible]
C/O STADIUM HIGH SCHOOL
[illegible] NORTH "E" STREET
TACOMA, WA [illegible]

SHIP TO
SAME

TERMS [illegible]

[illegible]

OICE NO.	INVOICE DATE	B/L NO./WT.	SHIP DATE	YOUR ORDER NO.	SHIP VIA		OUR ORDER NO.
[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	COD	[illegible]

NTITY	PART NO.	DESCRIPTION	UNIT PRICE	AMOUNT
DZ	[illegible]	TIGER, [illegible] BLUE/GOLD	19.80 DZ	[illegible]
		FREIGHT CHARGES		[illegible]
				[illegible]

OLM

CASH DISCOUNT IN AMOUNT OF $ ________
MAY BE TAKEN IF PAID BY________